



Concierge Assistant

User Manual

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Welcome

Welcome to the Concierge Assistant 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.

Note.- This Help System is designed for our network application only. If you want to see the Help System for CA Web please follow the link "Help Desk" in the "Help" menu once you login to the application.

Ask Someone

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

Most popular pages

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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](#).

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



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

- [User Forum](#)
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Contact our support department:

Email:

support@goldkeysolutions.com

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System Requirements

The Concierge Assistant application is written in Visual Basic 6 using network based Jet databases. An Internet browser is required for the network-hosted Concierge Web Page and Message Center features. Your email system must be MAPI compliant to take advantage of the software's ability to email itineraries and confirmations. Connection to the Internet is not required nor is any additional software

Workstation:

Windows 95/98/NT/2000/XP
64mb memory (Minimum)
15mb free hard disk space (50mb for the Master Computer)
Network Connectivity

Server:

Windows NT/2000/2003/XP Server or Novell Server Software
500mb free hard disk space recommended (for database folder and setup kit)

Storage Requirements:

When we initially download our application, (the software, the set-up data and the contact database (restaurants, churches, etc.)), it requires approximately 15mb of storage. We recommend having 500mb of space available to allow for growth and the efficient operation of our maintenance features. After operating for some time, a small to medium property will require from 50 to 100mb of storage. As a point of reference, a Las Vegas property has been using the system since May 2000, has 12 Concierges and, following our recommended maintenance procedures, their database is approximately 50mb.

Installation Requirements:

The only items needed from your IT department are the Network Path (Example: \\Servername\Apps\Concierge) for the installation, the property's logo (see below), an IT contact name and his/her email address and telephone number. Once the Network Path is received at GKS, we will finalize the software application and databases for your use, and then upload it to our FTP site for your IT to download to your network. An email is sent to the IT contact with the simple instructions on how to install The Concierge Assistant.

Logo Requirements:

The best formats for the property logo are:

1. Word template or document with logo
2. A .jpg, .gif, or .bmp file that most closely approximates the desired size
3. Any graphic file type (other than .gif) if the image is larger, these scale down well

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Screen Overview

The Concierge Assistant is a virtually complete digital notebook for the concierge. In one easy to use system we have combined:

- The Contacts Manager
- The Events Manager
- The Concierge-Guest Interaction Logbook
- The Messaging System
- The Groups and Convention Manager
- The Rental and "Need-It-Now" Inventory Manager
- The Guest Profiler

Each of these components will be explored in this Tutorial.

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Contacts

The Contact Manager is a Robust search engine that locates all vendors and contacts quickly by name, address, area or keyword. You can save multiple links to documents and website addresses on every contact. It interfaces with all Microsoft applications including Word, Excel and MapPoint. Create "Guest Lists" in PDF, RTF or Email formats of the most requested items such as church schedules, restaurants and kids activities, complete with property's logo graphics.

The Contact Status Messages alert and remind associates of vendor status changes until expiration date.

Primary Name	Contact Data	Address	Cross Streets	Keyword Set	Proximity	Rating
A Traveessa	+351 2139020	Travessa das Inglesinhas, :		Restaurant, Romantic		0
Absinthe Brasserie & Bar	(415) 551-159	398 Hayes Street		French, Nightlife, Rest		4
Ale Garden Cafe	(415) 928-434	The Cannery Courtyard		Restaurant, German, I	1.4 Miles	5
Basta Pasta Restaurant	(415) 434-224	1268 Grant Avenue		Restaurant, Italian	.8 Miles	0
Bella Voce Restaurant	(415) 772-519	950 Mason Street		Italian, Olivia's Recomm	.4 Miles	5
Bocce Cafe Italian Restaur	(415) 981-204	478 Green Street		Restaurant, Italian	.9 Miles	0
Clippinos	(415) 775-931	400 Jefferson Street	Leavenworth and Je	Italian, Restaurant	1.5 Miles	5
Contadina Trattoria	(415) 982-572	1800 Mason Street		Restaurant, Italian	.9 Miles	0
Hana Zen	(415) 421-210	156 Ellis Street		Restaurant, Japanese	.2 Miles	5
Hong Kong Seafood	(320) 778-656	23 High way		\$\$\$ Chinese, Kobe St		0
Korean Village Restaurant	(415) 751-633	4609 Geary Boulevard	Geary and 10th Ave	Restaurant, Barbeque	3.1 Miles	5
La Dama	+34.93.202.06	Avda. Diagonal 423		Restaurant		0
LA Limenita	(415) 824-283	3161 24th Street		Restaurant, Peruvian	2.4 Miles	5
Nates Barbeque Big Nates	(415) 861-424	1665 Folsom Street		Restaurant, Barbeque	1.2 Miles	5
New Korea House	(415) 931-783	1620 Post Street		Restaurant, Korean	.9 Miles	5
Oliver	+351 2134225	Rua do Alecrim 23		Restaurant		0
The Lobster	(415) 929-040	2223 Union Street	Union and Powell	Italian, Music, Party, Pi	1.6 Miles	0

All Concierge Assistant Search Displays use the same, simple metaphor to access your data. First, you select the information you wish to present. You can key in any portion of the information you wish to select. For example: keying in "Barry" in the Last Name selection will select all entries for guests named Barry, Barrymore, Barryfield, etc.

When you right-click on the contact the "Create a Logbook Entry" menu will appear. If you click on this you will be redirected to the Logbook entry panel.

If you wish to extract the information presented in the grid to a file that can be imported into any spreadsheet or word-processing program just press the Extract button and a file named CAContacts.csv will be created. An example of this feature would be to create an internal telephone directory. This file can then be formatted for distribution to team members who do not use the Concierge Assistant.

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Events

Keep event information in a database that any staff member can access. Link multiple website addresses for easy access and up-to-the-minute information on each event. Print event listings for the week, or personalize for specific dates when a guest will be in your location. Print, fax or email event schedules to a guest prior to arrival, or have on hand and available to guests already on property.

Concierge Event Manager - Leo Aguirre - Tuesday, June 10, 2008

Describe the Event

Concierge Staff
Tuesday, January 16, 2001 07:50 am

Event Name: **TOM JONES**

Location: **MGM GRAND HOTEL**

Telephone: **(702) 891-7777**

Starting Date: **3/19/2008** Through Date: **4/1/2008**

Dark: ☐ Print on Guest Events List ☒

Time: Type of Event: **Show**

Low Price: **.00** High Price: **.00**

Save Save & Repeat Delete Clear

Double Click to View Linked Document:

Link Description

Event Notes:

Link Description

Double OR Every:

High Date or DoW:

Option of Exception:

Delete Clear Save Maintain Link

All Concierge Assistant Search Displays use the same, simple metaphor to access your data. First, you select the information you wish to present. You can key in any portion of the information you wish to select. For example: keying in "George" in the Event Name selection will select all entries for events starring George Carlin, George Clinton, George Jones, etc.

To print a beautifully formatted Event Listing for your Guests you need only select one of the three options:

1. The Continuous list has all of those events that have no starting dates.
2. The Limited Dates list will by default print all events with dates occurring in the range of -7 to +21 days from the date the list is printed. If you have selected event dates then these dates will be used on the list.
3. The Future Events list prints all events with starting dates more than 21 days from the date the list is printed.

The Manage Events display allows you to add, change and delete your event information.

To add a new Event the following fields are required:

Event Name - The name of the Event.

Type of Event - The keyword that is used to categorize the Event for easy Search access. To select the keywords double-click in the list box of event types or select from the combo box

The remaining information is optional, the non-obvious elements include:

Dark - For long running or continuous events this is where you indicate the days the event is closed.

Print on Guest List - Check this box if you want the event information to print on the Guest Reports available on the Search Display.

Note:

The "Save and Repeat" command key will allow you save the current entry and retain all of the information except the Starting Date and Ending Date. This is a convenient feature for entry of sporting event schedules and other intermittent events.

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Logbook

Provide personalized and professionally customized confirmations and itineraries in PDF, RTF and Email formats that can be presented to your guests in up to 6 different languages. Locate all associated guest information by guest's name, group association, "Guest ID" and many other ways. Every entry is date, time and initial stamped by the person who has performed the task. See "Today's" activities color coded for a quick status check and avoid anything "falling between the cracks". Make Dining Reservations online directly from The Concierge Assistant with our Open Table interface. Archive past requests/reservations for easy access on returning guests. Management reports and graphs for current as well as historical information

The screenshot shows the Logbook application interface. At the top, there is a navigation bar with icons for Contacts, Events, Logbook (selected), Messages, Others, Profiles, and Administration. Below the navigation bar, there are two main sections: 'Select by' and 'Select Options'.

Select by:

- ☐ Concierge
- ☐ Last Name
- ☐ Refer Date
- ☐ Entry Date
- ☐ Room Number
- ☐ First Name
- ☐ Group
- ☐ Arrival Date
- ☐ Logbook ID
- ☐ Element
- ☒ None
- ☐ No 'Cancelled'
- Category (Opt):

Select Options:

- Entered Time Frame: ☐ Recent ☐ Last 7 Days ☒ All Dates
- Logbook Status: ☐ Open ☐ Closed ☒ All
- Sort Selection By:
- Quick Search:
-

Logbook Entries Table:

Last Name	First Name	Room #	Category	Notify	Refer Date	Time	Who	Description
Fernando (P)	Anaya		Pre-Arrival		2007/09/28		KC	(KC 2008/03/12 10:28)
Fernando (CXL)	Anaya		Preview Presentati		2008/02/01		KC	(KC 2007/11/30 07:19) ~~~ wife is sick
Fernando (P)	Anaya		Attempted to pitc		2008/02/01		KC	Marketing Code: 8598879 (KC 2008/01/i
Curts	Travis		Dining Reservation:		2008/02/06		KC	Requested Time: NoonRestaurant: The L
Curts	Travis		Preview Presentati		2008/02/06		KC	Tour Time: 4PMTour Location: galleryNig
Dafforn (CXL)	Christine	824	Amenity - In Housi		2008/02/06		KC	Type of Amenity: Milk and CookiesTime c
Fernando (P)	Anaya		Dining Reservation:		2008/02/06		KC	(KC 2007/10/25 14:23)
Gear	Joe	1652	Dining Reservation:		2008/02/06		KC	Requested Time: 8pmRestaurant: The L
Gear	Joe	1652	Fax/Photo Copies		2008/02/06		KC	Room Charge/Paid Out: room chargeTot
Gordon	lo	45	Floral		2008/02/06		KC	Company: LundsPrice: \$90 (KC 2001/12/
Staff Memo			General Informatio		2008/02/06		KC	Information: Mr. Jones wanted to thank
Barry	Jim		Golf		2008/02/06	07:00	KC	Golf Course: Malibu Country ClubConfirme
Sharpsteen (C)	Trudi	874	Transportation		2008/02/06	17:00	KC	Time: 5:00pmType of vehicle/#of people
Gear	Joe	1652	Amenity - In Housi		2008/02/06	19:00	KC	Type of Amenity: Champagne and Straw
Gear	Joe	1652	Amenity - In Housi		2008/02/07		KC	Type of Amenity: Champagne and Straw
Gomez (P)	Adan		Pre-Arrival		2008/02/07		KC	(KC 2007/10/19 14:30)
Gordon	lo	45	Dining Reservation:		2008/02/07		KC	Requested Time: 7:00 pmRestaurant: All
Smith		1111	Technical Assistanc		2008/02/07		KC	Email: is down(KC 2008/01/04 09:57) ~
Wilson (P)	James A	7676	Dry Cleaning		2008/02/07		KC	(KC 2008/02/06 11:27)
Wilson (P)	James A	7676	Transportation		2008/02/07		KC	Time: 9pmType of vehicle/#of people: L

To access your Logbook data choose the data element you wish to use for your search. Depending on your selection you will be presented with a drop-down calendar selector, a combo box or a text box. If a text box appears you may key in any portion of the data you wish to select by. As an way to limit your selections, you may optionally select a Logbook Category to narrow your selection.

To further refine your selection choices you may select for those entries that have been entered Today or Yesterday, In the Last Week or All Entries. You may also select to see only Open Entries (Includes Pending), only Closed Entries or All Entries without regard to their status.

To add a new Logbook entry the following fields are required:


Reference Date - The date the request is made for.

Type of Entry - The keyword that is used to categorize the Logbook Entry for easy Search access. To select the keyword double-click in the list box of logbook types or select from the combo box

The remaining information is optional but it is strongly recommended that you add as much information as possible.

After you have completed the information on the above display Click in the Descriptive Text box. If you have a Data Entry Form defined a panel like this will appear:

This form contains the fields you have specified as the optimal data set for this type of entry. There are no requirements and no data validation is possible for this panel.

If you are creating a reservation for a Contact Entry you may double-click on the Contact Icon  to select the Contact using:

Primary Name	Contact Data	Address	City	Keyword Set
American Express Golf Card	(800) 628-2244			Credit Card Info
Don Sherwood Golf & Tennis	(415) 989-5000	320 Grant Avenue	San Francisco	Golf, Supplies
Fleming 9 Hole Golf Course	(415) 661-1865	Harding Rd & Skyline Blvd	San Francisco	Golf, Course
Gleneagles International Golf C	(415) 587-2425	2100 Sunnydale Avenue	San Francisco	Golf, Course
Golden Gate 9 Hole Golf Course	(415) 751-8987	47th Avenue	San Francisco	Golf, Course

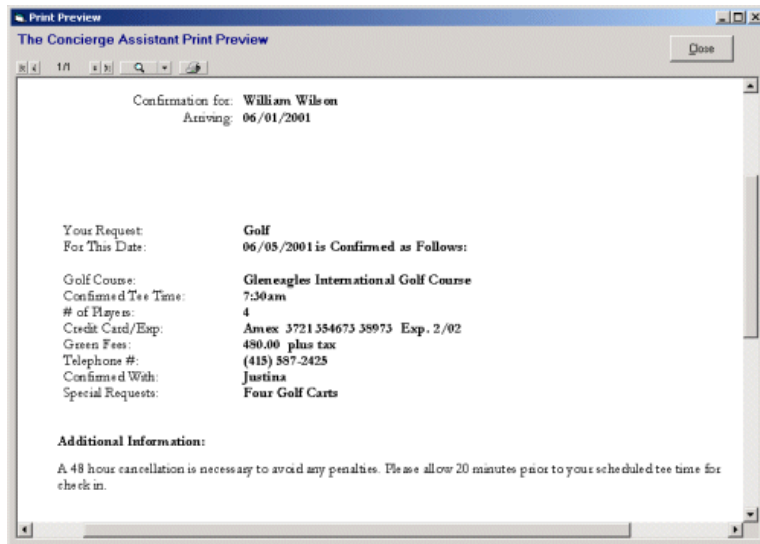
Double-click on the selected contact and a "Drag-and-Drop" panel will appear in the lower left side of the data entry display. This panel, as illustrated above, will contain the contact name, address, cross streets and telephone number. This information can be "dragged" on to your data entry panel fields.



The two printer icons are used to print the Service Request Form and the Guest Confirmation Form. These two forms are illustrated below.

First is the Service Request Form. This may be used to fax to the guest when a signature is required.

Next is the Guest Confirmation Form. The format of this report may be selected using the Palm© and Print Options section in the Administration Tab.



Note:

The "Save and Repeat" command key will allow you save the current entry and retain all of the information except the Type of Entry and Entry Status indicators. This is a convenient feature for entry of multiple logbook entries for a guest.

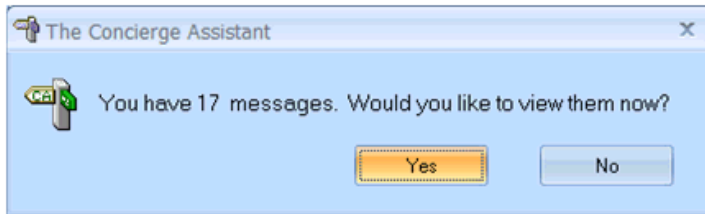
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Messages

Improve communications between shifts, concierge, and departments. 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 "Pass On" and "Forward" messages



The Concierge Assistant Messaging system is built on the ability to send three distinct types of messages:

1. Plain Text
2. Logbook Messages
3. Event Notifications
4. Contact Notifications
5. Profiles Notifications

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Profiles

The Profile Tab is where you can create an individualized profile of your guests. The true power of this feature lies in your ability to define ANY profile indicators you wish. You will never outgrow this feature. If you wish to keep track of some new element simply add it to the list of available indicators. You even have the ability to add a "data entry hint" to assist your staff in entering the information in the correct format! Run reports to capture information for direct mailings for Anniversaries, birthdays and all occasions.

The screenshot shows the 'Profiles' tab in a software application. The interface includes a menu bar (File, Tools, Help), a toolbar with icons for Contacts, Events, Logbook, Messages, Others, Profiles, and Administration, and a 'Logoff' button. Below the toolbar, there are three main sections: 'Select By', 'Extract Format', and 'Options'.

Select By: Radio buttons for Last Name, First Name, Profile Type, Indicator, Group, Unit, and None. A dropdown for 'Select Indicator' is set to 'Birthday', and a text field for 'Enter Value (Opt):' contains 'OCT'.

Extract Format: Radio buttons for Phone List, Fax List, and Export File. An 'Extract' button is present.

Options: A 'Sort By:' dropdown is set to 'Last Name'. A 'Profile Type Filter:' dropdown is set to 'No Filter'. An 'Add a Profile' button with a magnifying glass icon is at the bottom right.

Below these sections is a table with the following data:

Last Name	First Name	Address	Unit	City	Indicator	Selection
Clancy	Ken	The Mall	Suite 14	Redondo Beach	Birthday	Oct 21 Ken (Self)
Wilson	Edward	The Mall	Suite 23	Seattle	Birthday	Oct 08 Edward (Self)
Wilson	James A	The Mall	Suite 14	Culver City	Birthday	Oct 01 May Lee (Wife)
Wilson	Jessica	6524 E Western		Santa Monica	Birthday	Oct 03 Jessica (Self)
Wilson	William	33 Bayshore Blvd		Laguna Nigel	Birthday	Oct 15 William (Self)
Wilson	William	33 Bayshore Blvd		Laguna Nigel	Birthday	Oct 18 Wanda (Wife)

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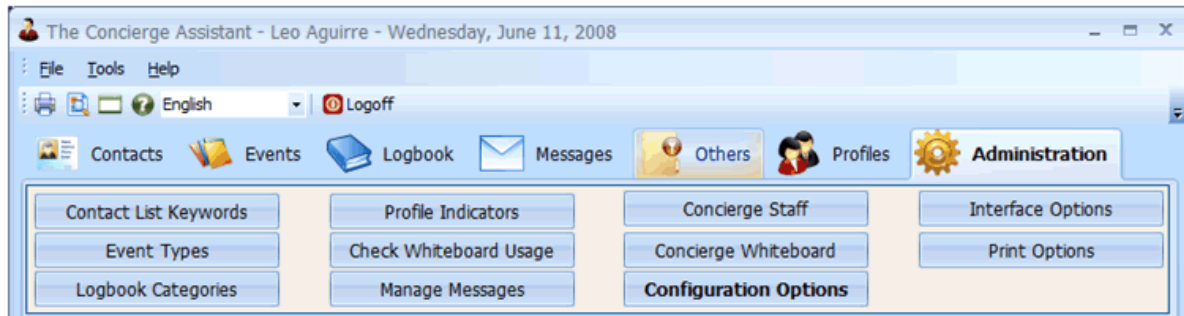
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Administration

Full control of your database, keywords, events, logbook categories, fonts, margins, etc to suit your specific needs. Individualize each associate's level of authority, access and functionality including linguistic abilities. Allow only authorized personnel to decrypt this sensitive information with complete audit train reporting.

The Administration Manager helps you to define how your Concierge Assistant will work. It is here that you select how you wish to categorize your information, who can access the information ...



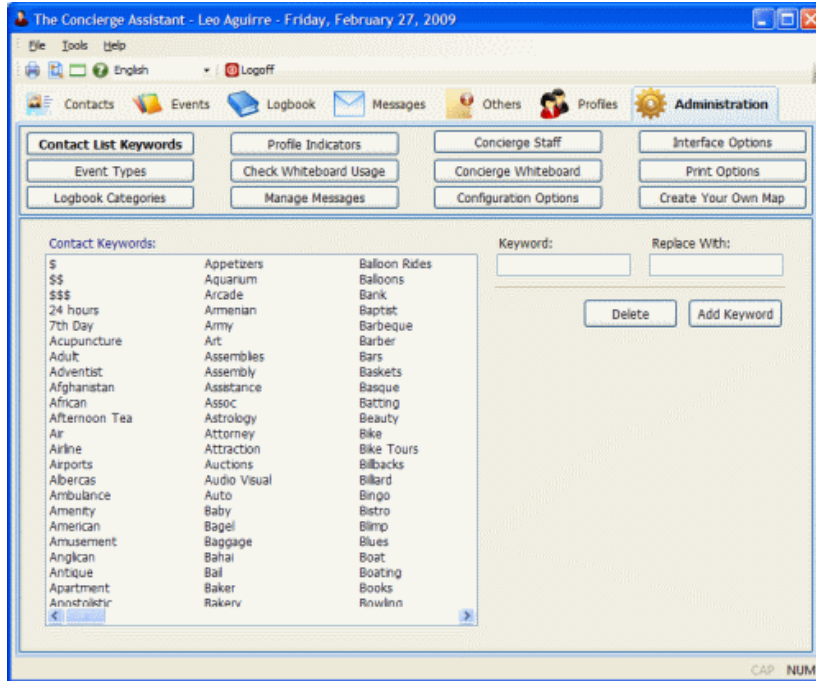
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Contact List Keywords

The Contact List Keywords are used to categorize your Contacts. For example, you will want to be able to look up all French Restaurants in your area. To do this you will want to have the categories "French" and "Restaurants" available as selection entries.



To add a new Contact List Keyword simply key the keyword into the Contact List Keyword field. Press Enter or click on Add Keyword and you have a new Contact List Keyword.

If you do not like a particular Contact List Keyword Name you may change it by selecting the original Contact List Keyword and keying the new description of the keyword into the "Replace With" field. When you change this field the Add button changes to a "Replace" button. Press the "Replace" button and all Contact entries using this keyword will be updated with the new keyword.

To delete a Contact List Keyword you select the keyword to be deleted and press the Delete button. If no Contacts are coded with this Contact List Keyword the keyword will be deleted.

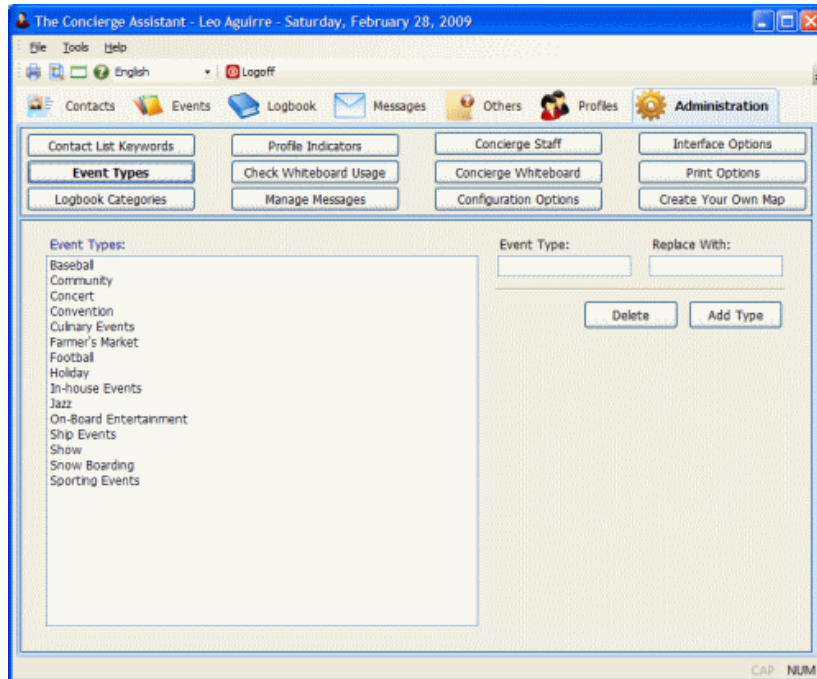
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Event Types

The Event Types are used to categorize your Event entries. For example, you will want to be able to look up all "Conventions" occurring this week. To do this you will want to have the category "Conventions" available as an Event Type selection.



To add a new Event Type simply key the type into the Event Type field. Press Enter or click on Add Type and you have a new Event Type.

If you do not like a particular Event Type Name you may change it by selecting the original Event Type and keying the new description of the event type into the "Replace With" field. When you change this field the Add button changes to a "Replace" button. Press the "Replace" button and all Event entries using this code will be updated with the new event type.

To delete an Event Type you select the type to be deleted and press the Delete button. If no Events are coded with this Event Type the type will be deleted.

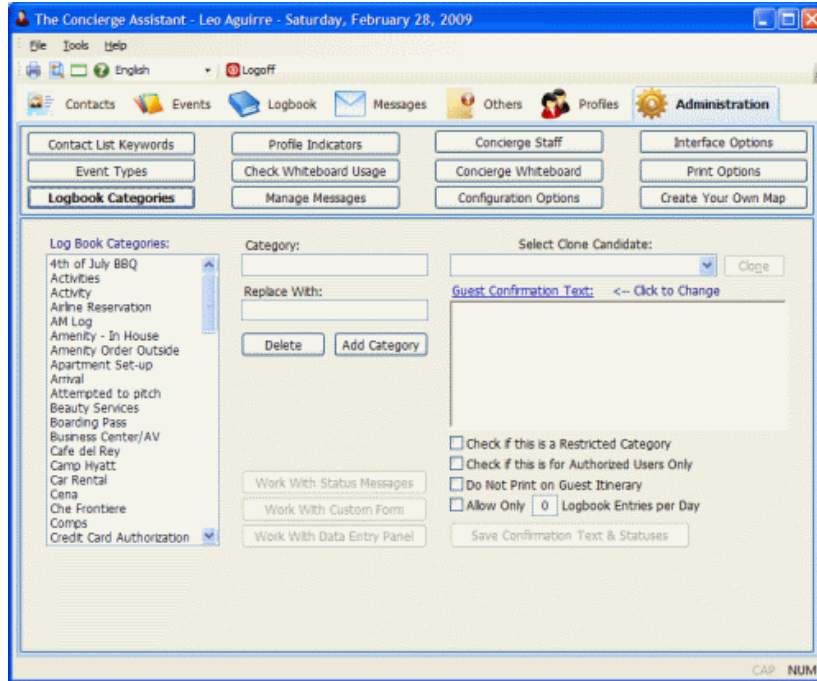
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Logbook Categories

The Logbook Categories are used to categorize your Logbook entries. For example, you will want to be able to look up all Limosine reservations occurring this week. To do this you will want to have the category "Limosine" available as an Logbook Category selection.



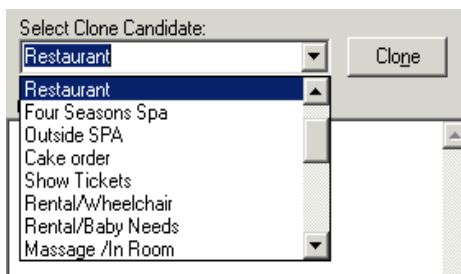
To add a new Logbook Category simply key the category into the Category field. If you choose to use the Confirmation text (used for additional information on guest confirmation reports) key the appropriate information into the Confirmation text field. An example of an "Golf" confirmation might be:

"A 48 hour cancellation is necessary to avoid any penalties. Please allow 20 minutes prior to your scheduled tee time for check in."

Press Enter or click on Add and you have a new Logbook Category.

If you do not like a particular Logbook Category Name you may change it by selecting the original Logbook Category and keying the new description of the logbook category into the "Replace With" field. When you change this field the Add button changes to a "Replace" button. Press the "Replace" button and all Logbook entries using this category will be updated with the new category name.

To delete a Logbook Category you select the category to be deleted and press the Delete button. If no Logbook entries are coded with this Logbook Category the category will be deleted.



If you know that another Logbook Category has been created that has the same Confirmation Text as this logbook category we have the "Clone" feature.

Simply select the Logbook Category from the Drop Down List and Press the Clone Button. The selected Confirmation Text will appear. You may edit the text as you wish.

If you wish to use this as a Restricted category click on the "Check if this is a Restricted Type of Logbook Category" checkbox. This category will then be accessible to "Restricted" Users.

See also

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Home > Advanced Functions > The Data Entry Panel

The Data Entry Panel

The Data Entry Panel is a powerful feature where you can define exactly what information you want the Concierge Staff to obtain for each type of logbook entry. You have a maximum of 15 labels to define for each logbook category.

To create a new Data Entry Panel simply click on the position of the label key the label text into the label field, and press Enter or click on Add. The cursor will automatically skip to the next label line. Repeat the process until all labels are defined.

Design Data Entry Form

Golf

Labels to be used for information requested:

- Golf Course:
- Confirmed Tee Time:
- # of Players:
- Credit Card/Exp:
- Green Fees:
- Telephone #:
- Confirmed With:
- Special Requests:
- Lead Number:

Buttons: Save Data Entry Design, Close, Link CODE, Clear All, Delete, Add, Clone

O-S	DnP	CODE	Message Text
0-9	DnP	1	Golf Course:
		0	Confirmed Tee Time:
		0	# of Players:
0-9	DnP	0	Credit Card/Exp:
		0	Green Fees:
		4	Telephone #:
		0	Confirmed With:
		6	Special Requests:
		0	Lead Number:

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.

To delete a Data Entry Panel label you select the label to be deleted and press the Delete button.

If you know that another Data Entry Panel has been created that is like what you wish to have for this logbook category we have the "Clone" feature.

Label to be used for information requested:

Buttons: Clear All, Delete, Add, Clone

Message Text: Airline Reservation

Company Name: Amenity Order Outside

Time of departure: Amenity/Room Service

Time of departure: Babysitters/Child Care/Pet Sitters

How Many Guests: Beauty Services

How Many Guests: Billback Show Tickets

How Many Guests: Bocelli Tickets

How Many Guests: Broker Tickets

Simply select the Data Entry Panel from the Drop Down List and Press the Clone Button. The selected Data Entry Panel will appear. You may add or change any label lines you wish.

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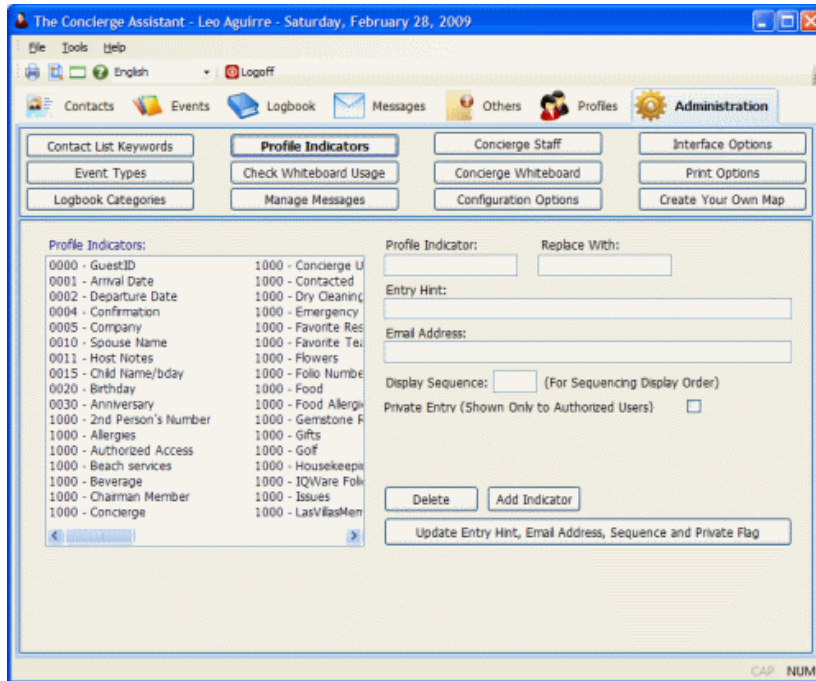
Home > Advanced Functions > Profile Indicators

Profile Indicators

The Profile Indicators are used to retain information about your most valued guests. These indicators are useful in creating specialized customer relationship and marketing lists.

You could use the Birthday indicator to create a list of all guests with birthdates in a selected month.

You could use multiple Housekeeping Indicators to inform the Housekeeping Department of special requirements prior to the guest's arrival. There is no limit to the information you can have available using Profile Indicators.



To add a new Profile Indicator simply key the indicator into the Profile Indicator field. If you choose to use the data entry hint key the appropriate hint into the Entry Hint field. An example of an "Anniversary" entry hint might be:

Mon DD, YYYY Event (Ex: Jul 05, 1985 Wedding)

Press Enter or click on Add Indicator and you have a new Profile Indicator.

If you do not like a particular Profile Indicator Name you may change it by selecting the original Profile Indicator and keying the new description of the indicator into the "Replace With" field. When you change this field the Add button changes to a "Replace" button. Press the "Replace" button and all Profile entries using this code will be updated with the new Profile Indicator.

To delete a Profile Indicator you select the indicator to be deleted and press the Delete button. If no Profiles are coded with this Profile Indicator the indicator will be deleted.

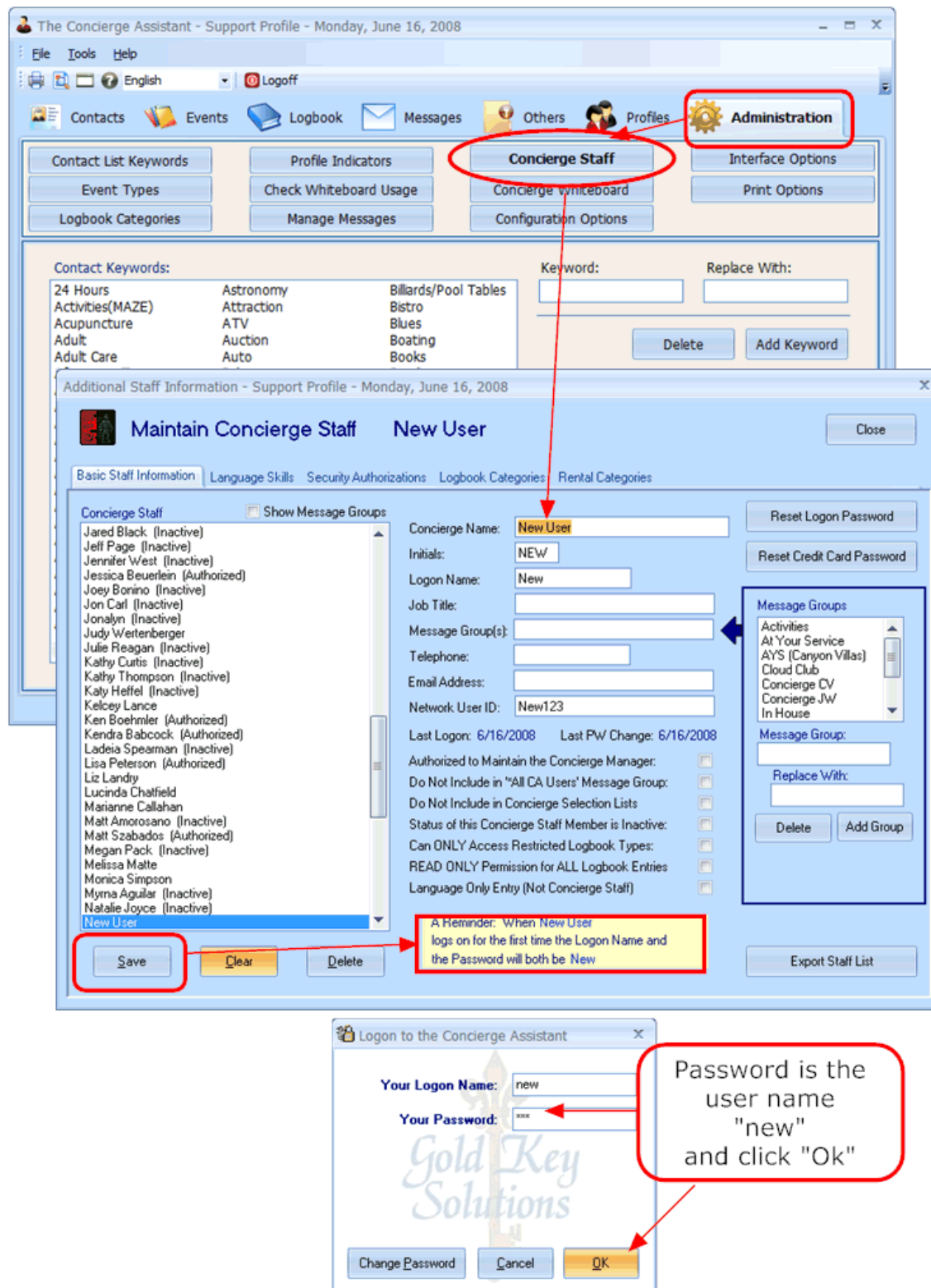
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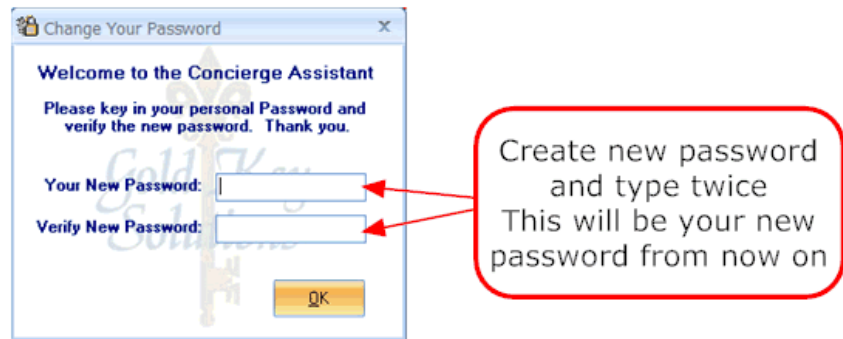
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Home > Advanced Functions > Concierge Staff

Concierge Staff

The Concierge Staff feature is there to help you manage your most valuable asset - your staff of Professional Concierges.





To add a new Staff Member the following fields are required:

Concierge Name - The name displayed in the title bar of the application. Should be First Name Last Name format eg. Jane Smith.

Initials - The initials are used to identify who added information to a Logbook entry. Initials must be unique

User Profile - This is the Logon Name to allow the Concierge to access the Concierge Assistant. Our recommendation is that you use the same name used to logon to your network.

The remaining information is optional:

Message Group(s) - We use Message Groups to enable you to send a message to a group of staff members.

Job Title - We use the job title to print the valediction on the confirmation forms and selected guest reports. If the job title is missing we print the words "Concierge Services" in its place.

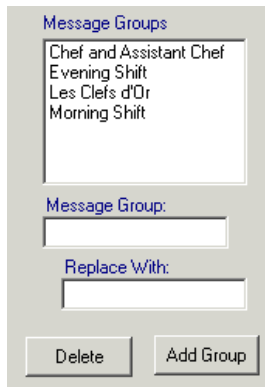
Authorized to Maintain the Concierge Manager: - this checkbox, when checked, allows the staff member access to the "Administration" tab of the Concierge Assistant. In addition, the staff member will be able to purge/delete Logbook, Event and Archive entries using the Maintenance Program.

Status of this Concierge Staff Member is Inactive: - this checkbox, when checked, flags the staff member as inactive. This status prevents messages sent to "All Concierges" from being sent to this staff member. You should set this status when the staff member is on vacation.

Can ONLY Access Restricted Log Book Types: - this checkbox, when checked, restricts the staff member access to [Restricted](#) Logbook entries only.

Message Groups

To add a new Message Group simply key the Group Name into the Message Group field. ; Press Enter or click on Add Group and you have a new Message Group.



If you do not like a particular Message Group name you may change it by selecting the original Message Group and keying the new description of the message group into the "Replace With" field. When you change this field the Add button changes to a "Replace" button. Press the "Replace" button and all Staff entries using this code will be updated with the new Message Group.

To delete a Message Group you select the group to be deleted and press the Delete button. If no Staff members are coded with this Message Group the group will be deleted.

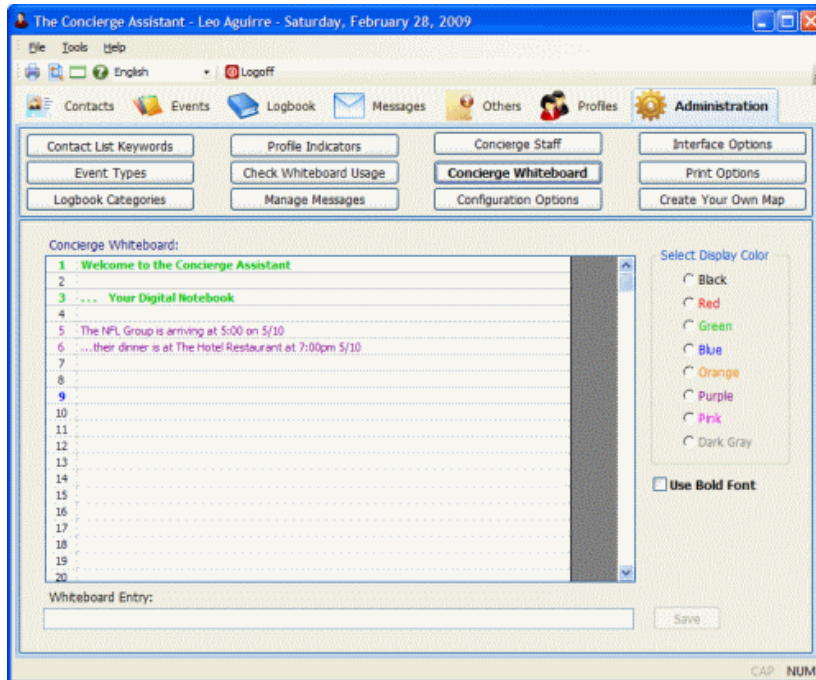
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Home > Advanced Functions > Concierge White Board

Concierge White Board

The Concierge Whiteboard is there to help you communicate digitally what you used to write on the whiteboard in the back office.



To maintain the whiteboard you simply double-click on the line number you wish to change. Key in the new text, select your color and check the check box if you wish to use the "bold" font. Then press enter or click on the "Save" button.

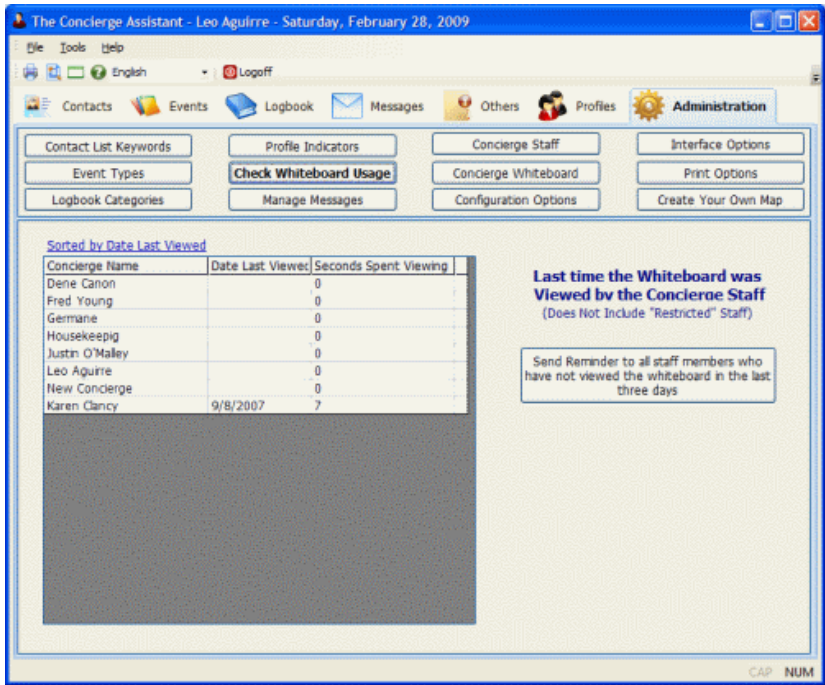
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Home > Advanced Functions > White Board Usage

White Board Usage

The Concierge Whiteboard Usage display will show you the last time your staff members viewed the whiteboard and the number of seconds they spent viewing the board.



The message button will send a gentle reminder to all staff members who have not viewed the whiteboard in the last three days.

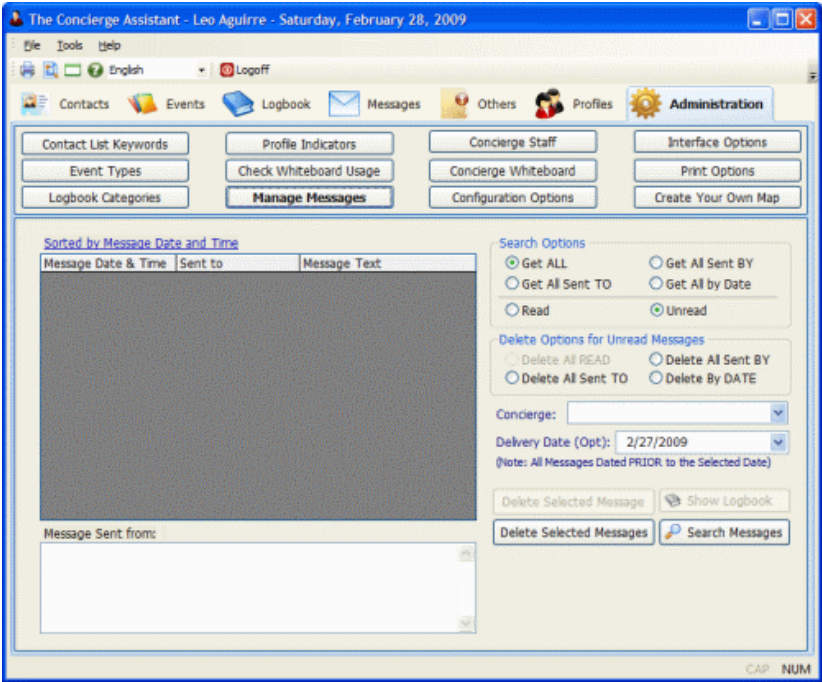
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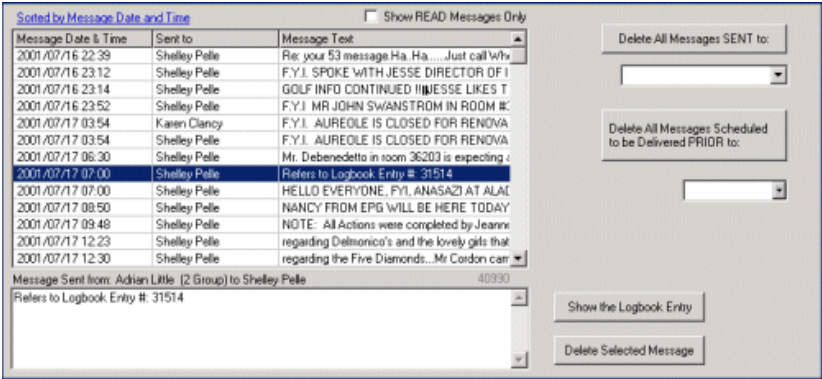
Home > Advanced Functions > Manage Messages

Manage Messages

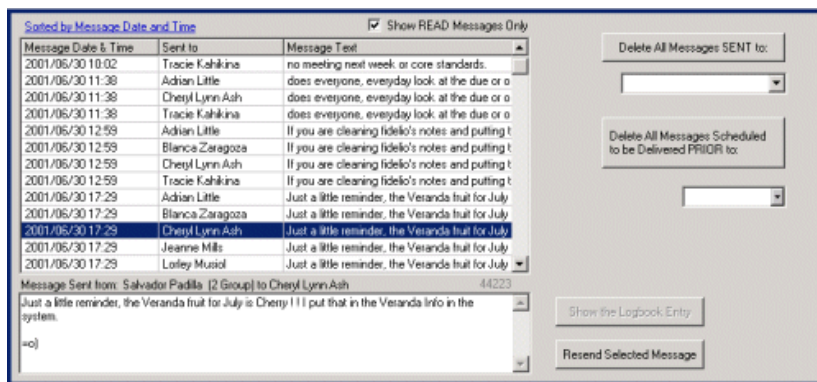
The Manage Messages display will show you all of the messages with Send Dates greater than the date of your last Logbook Entry Purge.



Double-click on an "Unread" message and you can delete the message. If the message is a Logbook Message you also have an option to view the Logbook entry.



The initial display shows all of the messages waiting to be sent. If you check the box titled "Show READ Messages Only" the display will show all sent messages.



Double-click on a "Read" message and you can resend the message.

See also

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Configuration Options

The Configuration Options display allows you to define how your version of The Concierge Assistant will work and how it will look.

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Create Your Own Map

The Create Your Own Map display looks like:

The screenshot shows the 'The Concierge Assistant' application window. The title bar reads 'The Concierge Assistant - Leo Aguirre - Saturday, February 28, 2009'. The menu bar includes 'File', 'Tools', and 'Help'. Below the menu bar is a toolbar with icons for 'Contacts', 'Events', 'Logbook', 'Messages', 'Others', 'Profiles', and 'Administration'. The 'Administration' menu is currently selected, displaying a grid of buttons: 'Contact List Keywords', 'Event Types', 'Logbook Categories', 'Profile Indicators', 'Check Whiteboard Usage', 'Manage Messages', 'Concierge Staff', 'Concierge Whiteboard', 'Configuration Options', 'Interface Options', 'Print Options', and 'Create Your Own Map'. The 'Create Your Own Map' button is highlighted. The main form area contains two columns: 'Starting Point' and 'Ending Point'. Each column has input fields for 'Name', 'Address', 'City', 'State', and 'Postal Code'. The 'Starting Point' fields are populated with 'The GKS Hotel & Spa', '600 Stockton Street', 'San Francisco', 'CA', and '94108'. The 'Ending Point' fields are empty. Below these fields are three radio buttons: 'Use Your Address as the Starting Point' (selected), 'Use Your Address as the Ending Point', and 'Reset Both Points to Default Values'. To the right of these buttons are two buttons: 'Generate Map' and 'Save Your Address'. A small asterisked note at the bottom left of the form area reads: '* Select this option to enable you to Save your starting location (if authorized)'. The bottom right corner of the window shows 'CAP' and 'NUM'.

With the click of the mouse you may choose to user your address as either the Starting Point or the Ending Point on your map.

If you are an Authorized User you will have the option on this display to Save your property address. This is the address used when you create a map from your select Contact.

Key in the Other Address - Starting or Ending - using complete information including the postal code and click on Generate Map. Within moments you will see a map that looks like . . .

The screenshot shows the 'Print Preview' window of 'The Concierge Assistant'. The title bar reads 'Print Preview'. The window content includes a header with 'The Argyle Concierge Department Telephone and Fax Numbers' and 'Page: 1 Support Profile'. Below this is the section 'Point to Point Directions'. It lists the 'Starting Address' as 'The Argyle, 501 Geary Street, San Francisco, CA 94102' and the 'Ending Address' as 'Richelieu Hotel, 1040 Van Ness, San Francisco, CA 94109'. Under 'Directions:', it provides a summary: '0.6 miles (Less than 1 minute)' and a list of instructions: '0.0 Depart 501 Geary St, San Francisco, CA 94102 on Geary St (West) 0.5 mi', '0.5 Turn LEFT (South) onto US-101 (Van Ness Ave) 65 yds', and '0.6 Arrive 1040 Van Ness Ave, San Francisco, CA 94109'. At the bottom is a map showing the route from Geary St to Van Ness Ave, with a green line indicating the path. The map includes labels for various streets like Austin St, Bush St, Sutter St, and others.

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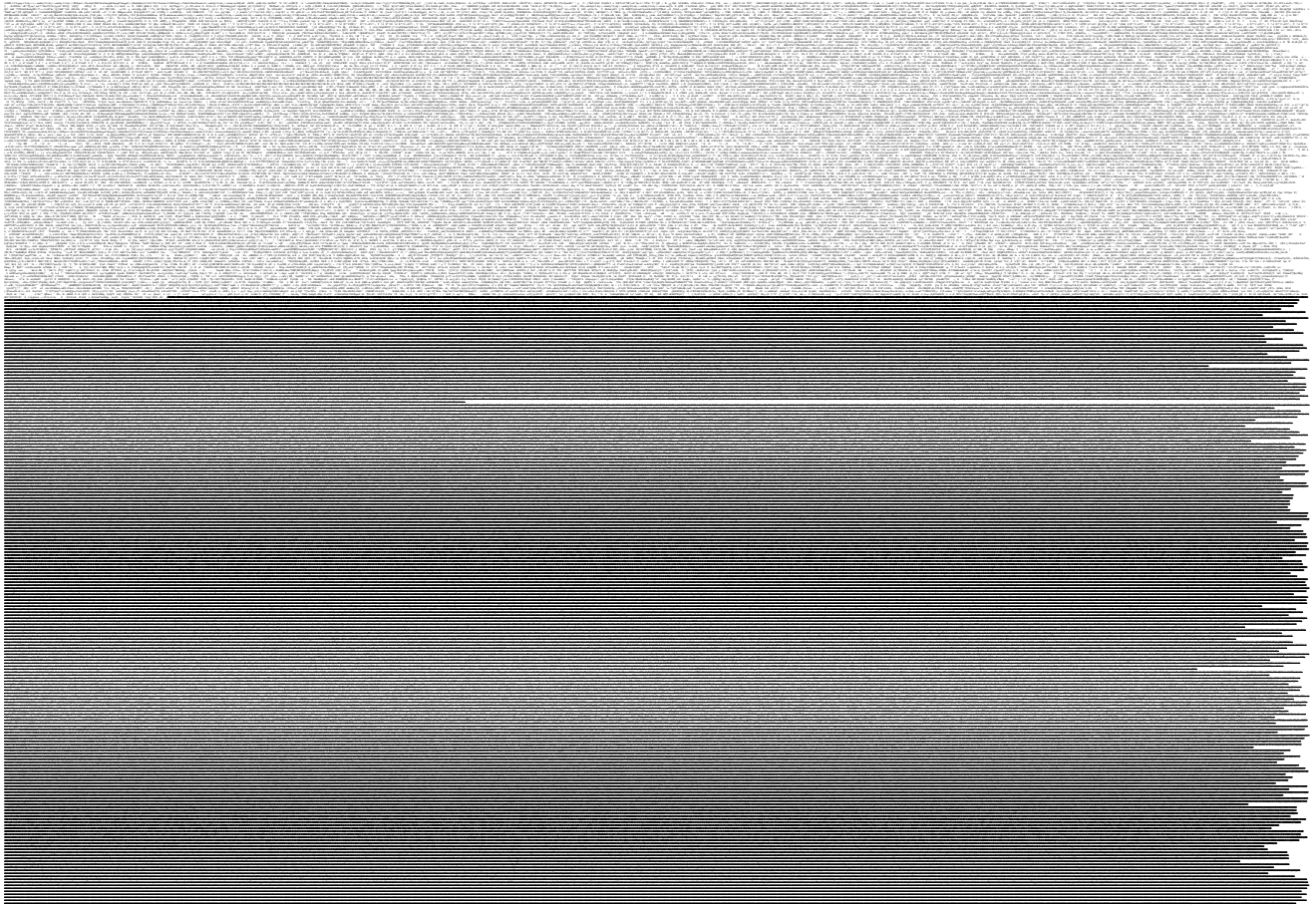
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Key Control

Under Construction

See also

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Reports

Track revenue and items that are rented or loaned to your guests. Track and organize availability through our Reservation system for Spa, Golf and other Activities and Services offered. Create multiple Hyperlinks for all of your dynamic information including Group resumes and photographs. Profile repeat guests to anticipate their needs, including their photo to improve guest recognition. Extract and Export information for marketing and management strategies e.g. future events for your property.

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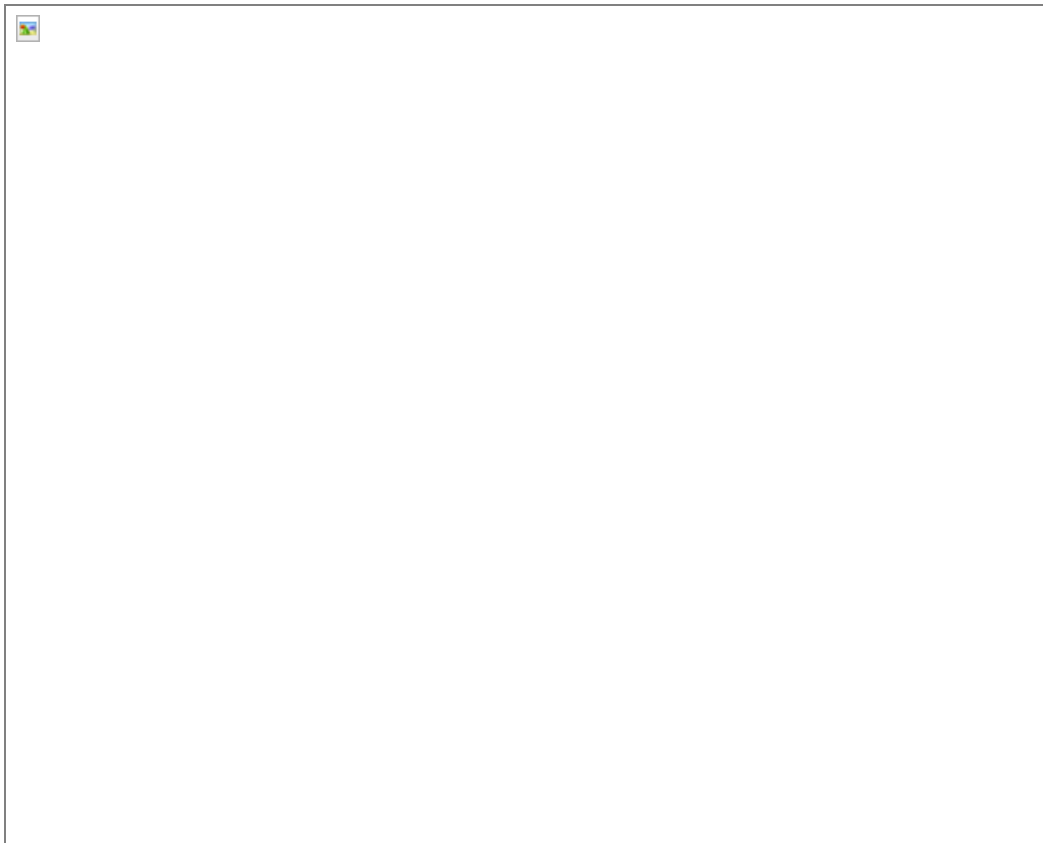
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Add a Contact

No audio!!!



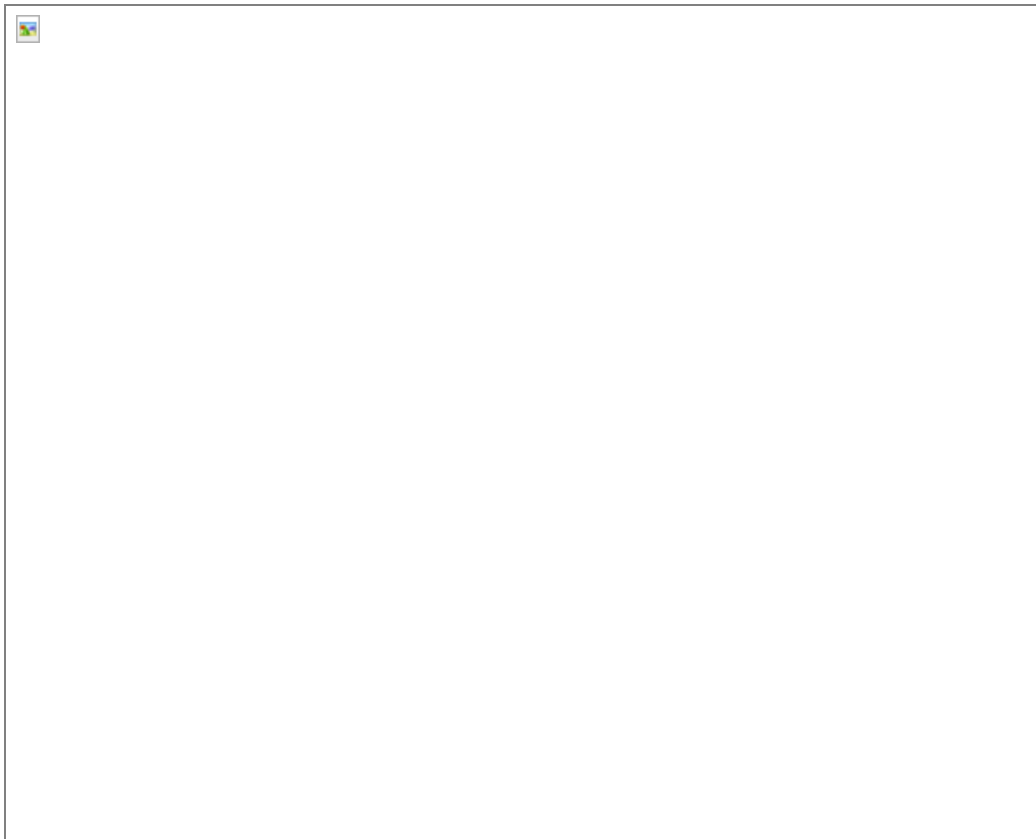
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Search Contacts

No Audio!!



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Add a Logbook Entry

No audio!!



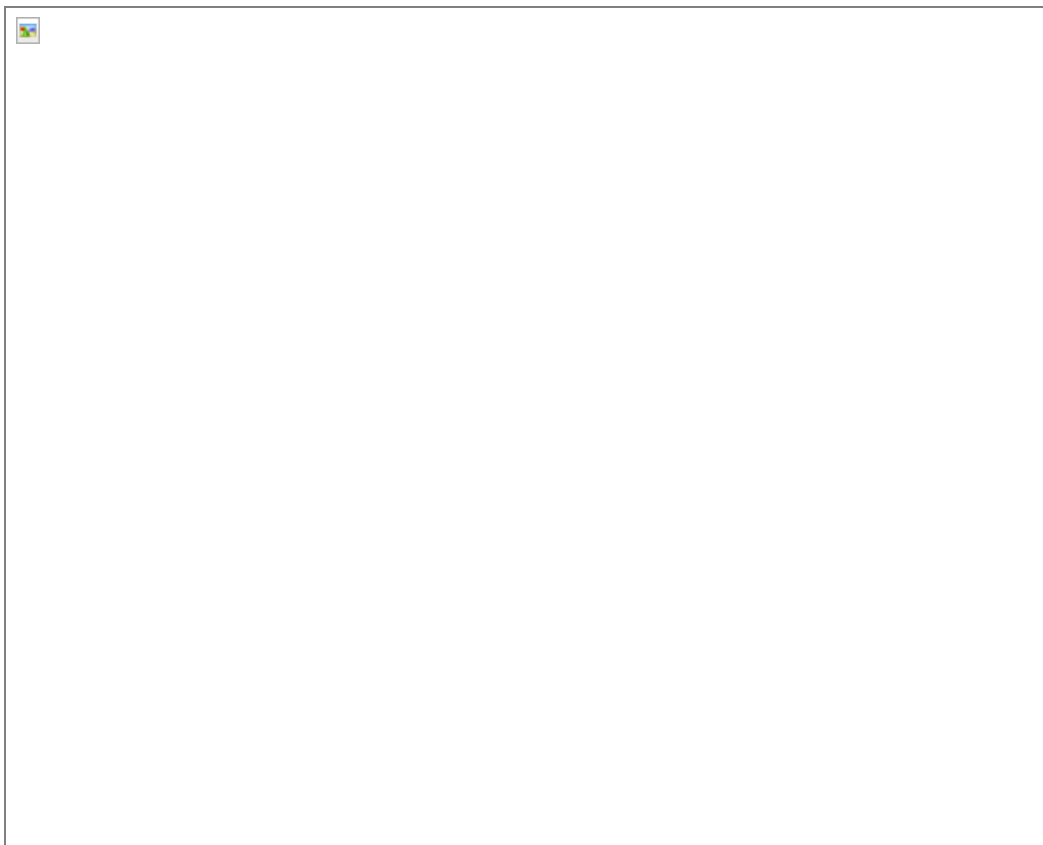
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Print A Confirmation

No Audio!!



See also

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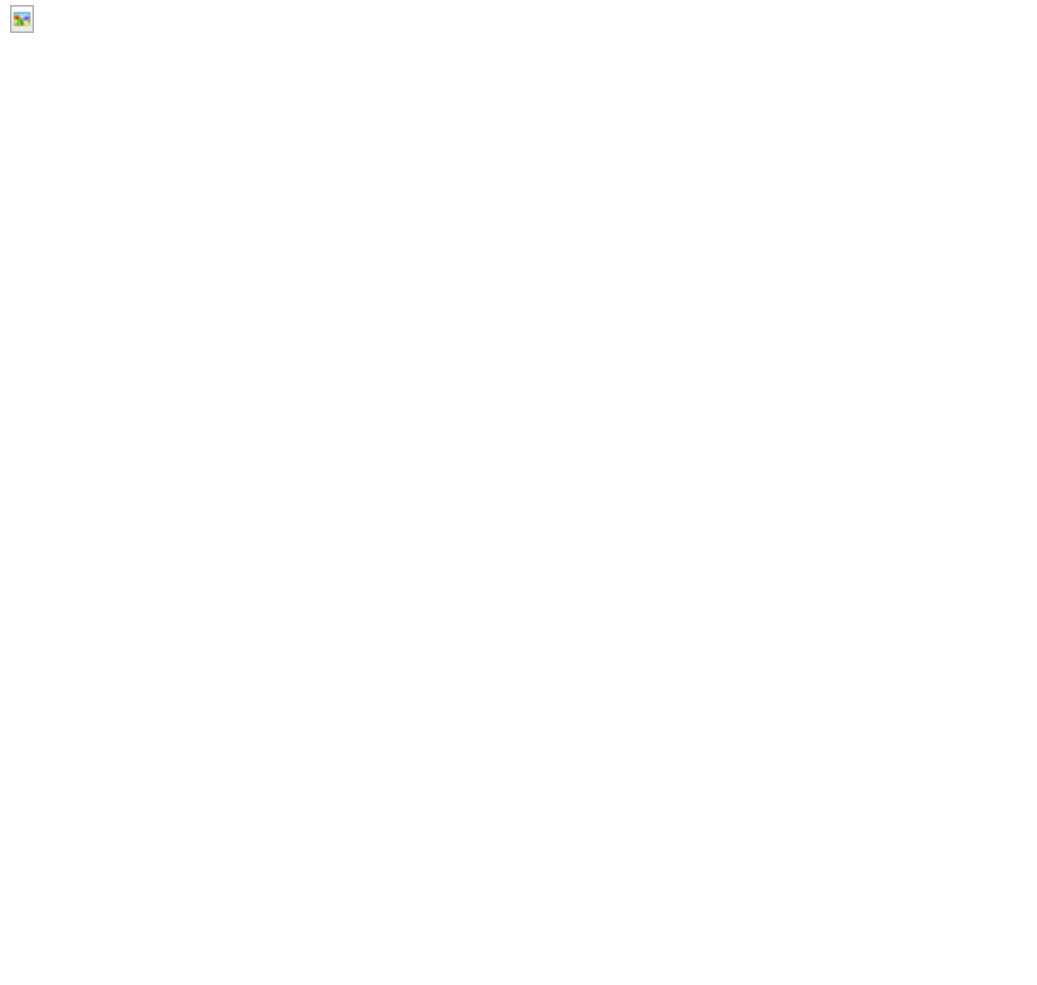
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PCI PA-DSS

Visa CISP

As of December 2006, The Concierge Assistant® is a Visa CISP and PABP validated solution. CA uses Triple DES/AES methods to encrypt credit card information. As part of the Visa CISP validation, below are 2 document links that you may find helpful;

1.  [Best Practices - Credit Card Encryption](#) which can be used as a training document for your staff members, specifically for those that are authorized to de-encrypt the credit card.

2.  [The CA Visa CISP Implementation Guide](#) which gives a comprehensive overview of the CISP program as it relates to The Concierge Assistant.

 [Visa Acceptance Letter](#)

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General FAQ

What do I need to get started?

The Concierge Assistant is a complex system that is very easy to use. To make it work the way you want it to there are several things you must setup before you begin to use it.

Contact List Keywords

These keywords are used to allow you to create the list of contacts that fit your guest's request. If he has asked about Thai Restaurants you can give him a list of the Thai Restaurants in your area.

Event Types

These types are used to group event entries. If your guest has asked about Boxing events you can give him a list of the Boxing Matches scheduled to occur in your coverage area.

Logbook Categories

These categories are used to group logbook entries. Think about how you want to analyze your entries before creating new categories. Do you want to see all restaurant reservations as a group and also be able to know how many reservations you have made for a particular restaurant? You have the ability to create a Vendor/Commission Report to list all restaurant reservations and sort by the restaurant name.

Take a close look at your Data Entry Panels. These should not be changed once they have been defined. Any change, even a single character, means that the data on you pre-existing logbook entries may be lost. You may add additional line items, but please do not change the panels once your staff has begun to use them.

Perhaps your General Manager asks you how many covers you booked for your property's gourmet restaurant last week. If you had included that restaurant as a logbook category you could run a report that will give you a list of all of the reservations booked during that time frame.

Profile Indicators

These indicators are used to store information about your most valued guests. You decide what types of information to retain. If your Marketing Department wants to run a special Anniversary promotion you will be able to give them a list of all Anniversaries by date, by state and city, or by name.

Concierge Staff Members

Each Concierge staff member has a Logon Name to use in accessing the Concierge Assistant. The initials you enter allow you to see who has added comments to the Logbook entries. You define who has access to the authorized features of the Concierge Assistant.

Where is the "old" Tutorial?

We are enhancing this help desk on a regular basis, but..... should you need to access the "old" tutorial simply click [here](#).

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Concierge Assistant