STS

Sales Tracking System

User's Guide–Version 1.38

PMB 191, 10332 Main St.
Fairfax, VA 22030
(703) 978-9300 Fax: (703) 978-9301

STS

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INTRODUCTION

The Sales Tracking System is a comprehensive, full featured, computerized sales and catering system. STS will allow you to more effectively manage your account management activities including tracking, contacts, sales calls and traces. Also, simply by entering group bookings, a variety of other reports including ***automated contracts***, ***group resumes***, ***daily in-house reports, banquet event orders***, among many others, may be generated from the information already input, thus resulting in significant time savings. STS is an *Account* based system. This is different from contact managers in the market such as ACT or Gold Mine which are *Contact* based.

Additionally, STS provides you with extensive reporting features to identify your top accounts, actual average rates of the accounts, room night consumption reports by company or market segment, market share analysis, lost business, group rooms production reports, to name a few. It also allows you to easily merge information to generate contracts, letters and mailing labels. Finally, you may use the *Trace* and *Sales Call* features to automate the collection of this important information in order to better manage your accounts.

The result – STS is a simple solution for your sales automation needs.

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System Requirements

We recommend when purchasing new computers you follow the guidelines below to ensure you are purchasing a computer than can effectively operate many of the software packages developed to operate under Windows 95/98 or Windows NT.

Workstation Specifications

- IBM compatible computer with 333 mhz processor (Pentium III or better).
- Windows 98, ME, Windows NT, 2000 or XP operating system.
- 24x CD ROM.
- 256 megabytes of RAM or higher
- 4.0 gigabyte hard drive.
- 15" Color Monitor with .28 dot pitch running at **800 x 600** resolution.
- Printer (preferably a laser if networked and more than 2 users will be sharing it).

All of the specifications above would be considered minimum configurations for a computer that could effectively run various software packages developed for Windows. Increasing the speed of the computer or storage capabilities would not be necessary but could be done if your budget allows. The system can run on lesser processors with 128 megabytes of RAM but performance may not be acceptable for a moderate to heavy use workstation.

File Server (optional)

A dedicated File Server is preferred but optional in a small workgroup (2-4 users). The database can reside on one of the workstations and accessed by the other computers on the network.

Networking

STS can operate on a dedicated server or a peer to peer network. A peer to peer network is sufficient for networking small work groups and keeps the costs down by not requiring the purchase of a separate computer to be used as a dedicated file server. Below find recommendations for network hardware. Networks with 5 or more users should plan for a dedicated server.

- Ethernet 10 or 100 megabits per second twist pair cards
- Ethernet twisted pair hub
- Ethernet twisted pair cable
- **File Server**-Dedicated file servers can be running Windows NT Server (4.0 or higher), Windows XP Professional or Novell Netware (3.12 or higher). The file server should be powered by a Pentium class processor with a minimum of 256 megabytes of RAM.

SYSTEM OVERVIEW

The following is designed to provide you with an *overview/order* of the steps involved in making your STS system a success. Although briefly highlighted here, complete instructions corresponding to each of these steps are provided in the related sections of this user's guide. Properly setting up your accounts and entering your sales calls, daily tracking and group bookings will allow you to generate accurate management reports to satisfy your reporting requirements.

Installation and Configuration

- *Install* STS according to the instructions on the previous pages.

- Enter Location Info under Utilities | Configure Hotel Info to make the system hotel-specific. Enter location code, name/address and rooms available. The other fields have been pre-configured and you will not need to change them at this time.

- Add *salespersons* (prior to adding or importing accounts) under Utilities/Table Maintenance.

- Add/review *market segment* codes under Utilities/Table Maintenance. *(The system has been preconfigured with a list of approved market segments. Consult your corporate sales support person prior to modifying this list.)*

- **Regular backups should be make of STS. At a minimum, Simple Solutions recommends that backups be performed several times a week**. If you are entering a large amount of information daily then it is recommended that you backup everyday. The backup system in STS is very fast and should only take 2-5 minutes per day to backup. After you determine which days of the week you will be backing up on, secure clean formatted diskettes and label each with the day of the week. Use your Monday backup disk for Monday, Wednesday for Wednesday, etc.

  Backing up your information is extremely important and time should be allocated to do this on a regular basis. Just remember, if you do not have a current backup and your computer crashes or your data gets corrupted, then you will have to re-enter all the information entered since your last backup.

<u>Account Management</u> (*quick overview*)

STS is an Account based system. This means you must have an account set up with a file code to enter any information into the system. STS can help you effectively manage your accounts and all the pertinent information and/or activity for these accounts. Pertinent information would include account *profiles* and *contact* information. Activity would include *room night tracking*, *group bookings*, *sales calls* and *traces*. Before you can utilize the system properly, ***you must set up each account ONCE*** that you wish to track. Accounts can be broken down into two categories, "**Specific Accounts**" and "**Generic Accounts**". Below, please find a brief definition of each of these account types and an overview of the steps involved to properly utilize the software.

SPECIFIC ACCOUNTS - Specific accounts can be defined as accounts for which you would normally set up a "file". These are accounts for which you would like to have specific information on file, such as profile and contact information, and possibly room night consumption tracking. Some of these specific accounts would be high producers and would fall into a "Key" account category. You should have a "Key Account" field on the account screen which will allow you to enter a **Y** for key accounts. Below is a quick overview of the steps for adding specific accounts and related information:

- From the Main Menu click on Accounts|Add/Retrieve.
- Click the **Add** button.
- Fill in the first screen (File Code, Corp No, Account Name, Market Segment and Sales ID are mandatory).
- If applicable, click the **Profile** tab at the bottom of the screen.
- Fill in the applicable profile information on each tab.
- Click the **Account** tab to return to the main account screen.
- Click the **OK** button to save the account information. If you filled in the contact name, a contact was automatically added for you.

If the account has additional **Contacts** you can add those now.

- From the account screen click the **Contacts** button.
- Click the **Add** button.
- Fill in the fields on the **Contact Details** tab.
- Click the **Contact Profile** tab. Fill in any available information for this contact.
- Click **OK** to save.
- There is no limit to the number of contacts you can add for each account.

You are now ready to add your **Sales Call** information.

- From the account screen click the **Calls** button.
- Click the **Add** button.
- Fill in the fields including the note window at the bottom. Pay special attention to entering the proper code in the "Call Type" field. This field allows you to categorize your calls into "Cold Call", "Telemarketing", etc. Categorizing your call properly will become very important when you run your sales call reports. You can also enter a "Trace Date" on the bottom of the sales call screen. A good sales call normally consists of "two" components. The sales call information you are logging today and the next time you should trace this account for.
- Click **OK** to save.

<u>Account Management</u> – Specific Accounts - *continued*

You are now ready to Add/View your **Trace** information.

- From the account screen click the **Traces** button.
- Click the **Add** button to add a new trace.
- To view traces click on the **Find** button. Fill in the fields to match the traces you would like to view and click the **OK** button. The system will only show you the traces that match the information you entered.

GENERIC ACCOUNTS - Generic accounts fall into two categories. Accounts you set up *for tracking room night consumption* and an account *for capturing your prospecting sales activity*.

Examples of generic accounts you would add to capture generic transient or group booking activity:

WERT-Weekend Rate
SPRT-Sport
AAAA-Triple A
WEDD-Wedding
REUN-Reunion

It is also recommended that you set up a generic account for each of the market segments you track. This will give you a code to track the room nights that do not fall under one of the specific accounts.

Examples would include:

CORP-Corporate
GOVT-Government
PREF-Preferred
TOUR-Tour
LEIS-Leisure

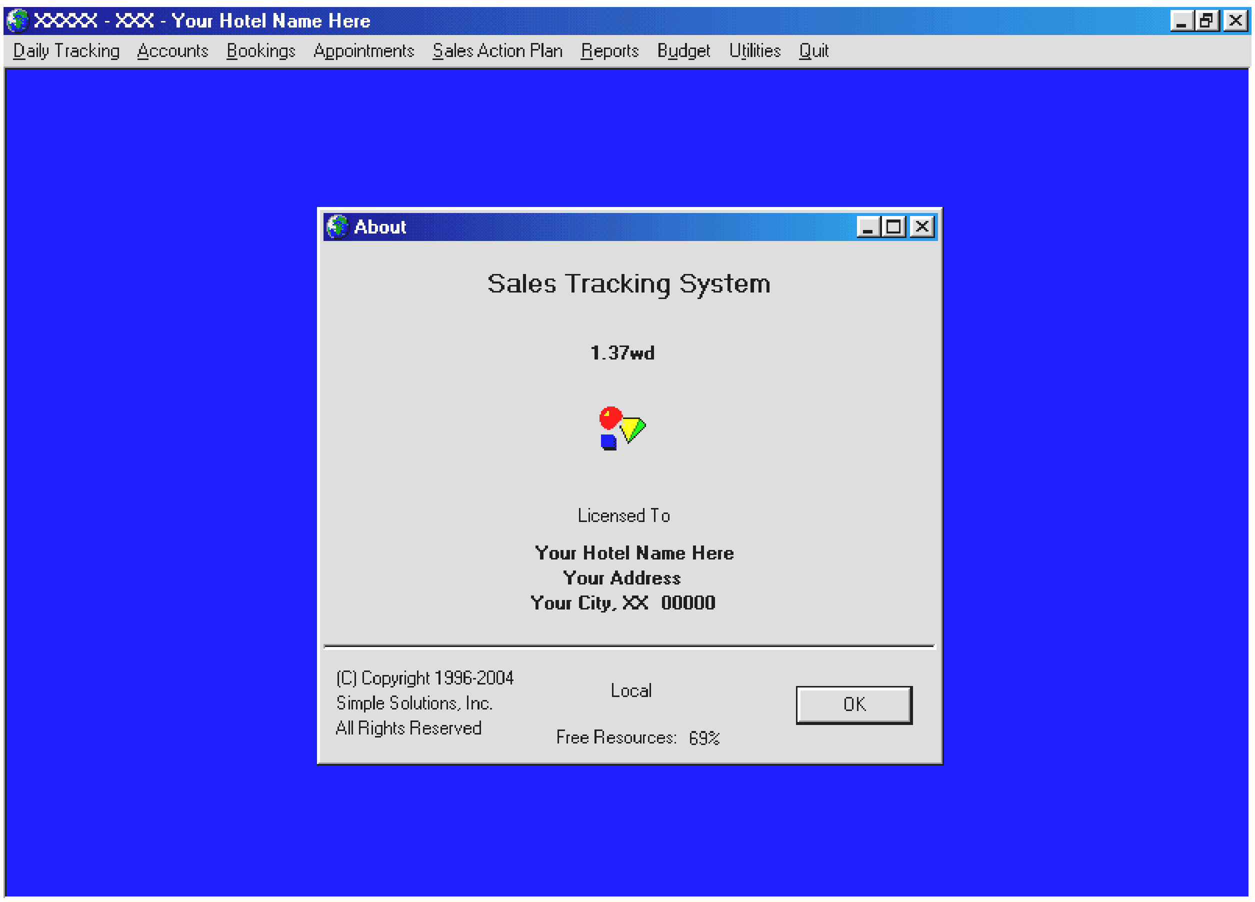
Finally for capturing your prospecting sales activity, you should add an account called **"Prospect Account"**. Use **PROS** for the four letter code. By adding this prospect account, you will have an account code to use for entering your prospecting sales calls. The steps for entering sales calls for the prospect account are identical to the steps for specific accounts except you would use the same code **PROS** for all of your prospecting sales calls. Address fields have been added to the sales call screen to allow you to capture enough pertinent information on the person to whom you are making the sales call. You might add another generic account called **Inquiry**. This account could be used to log incoming inquiry calls about your hotel.

GETTING STARTED

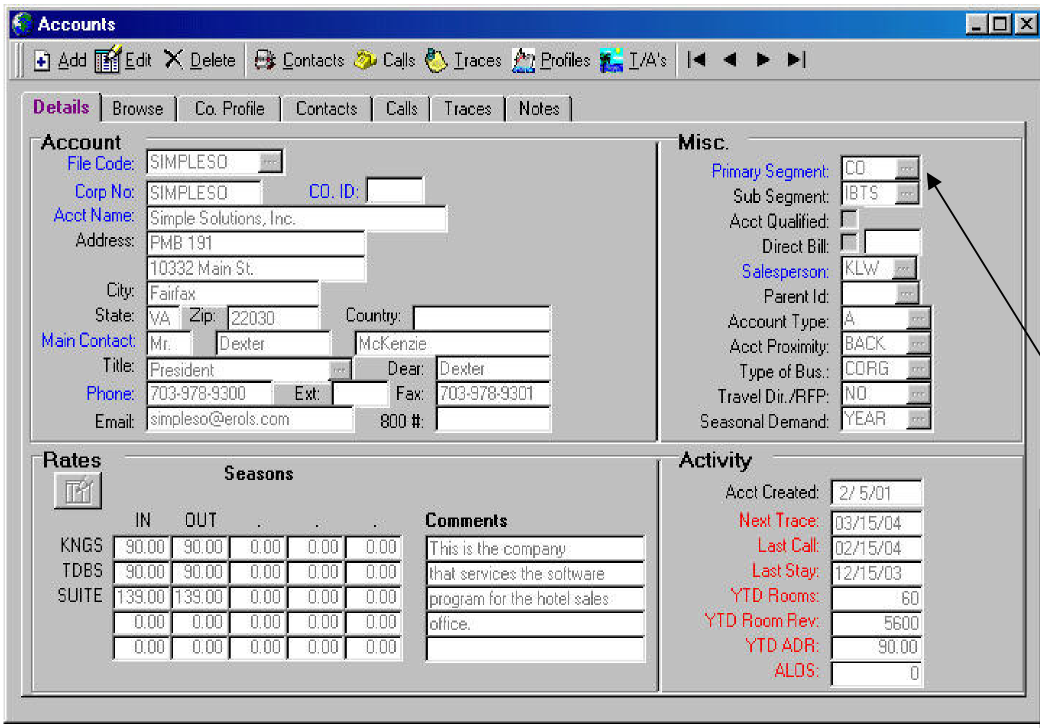
To start STS, double click on the STS icon. Enter your password. If you have not been assigned a specific password, use MASTER. In a few moments, the main screen should appear.

The menu system utilized in STS is a pull-down menu approach. Once you click on an option from the menu bar, you will be presented with a cascading menu relating to the main category. (*For keyboard users*: Use Alt + the appropriate underlined shortcut/accelerator key to choose the main menu items.)

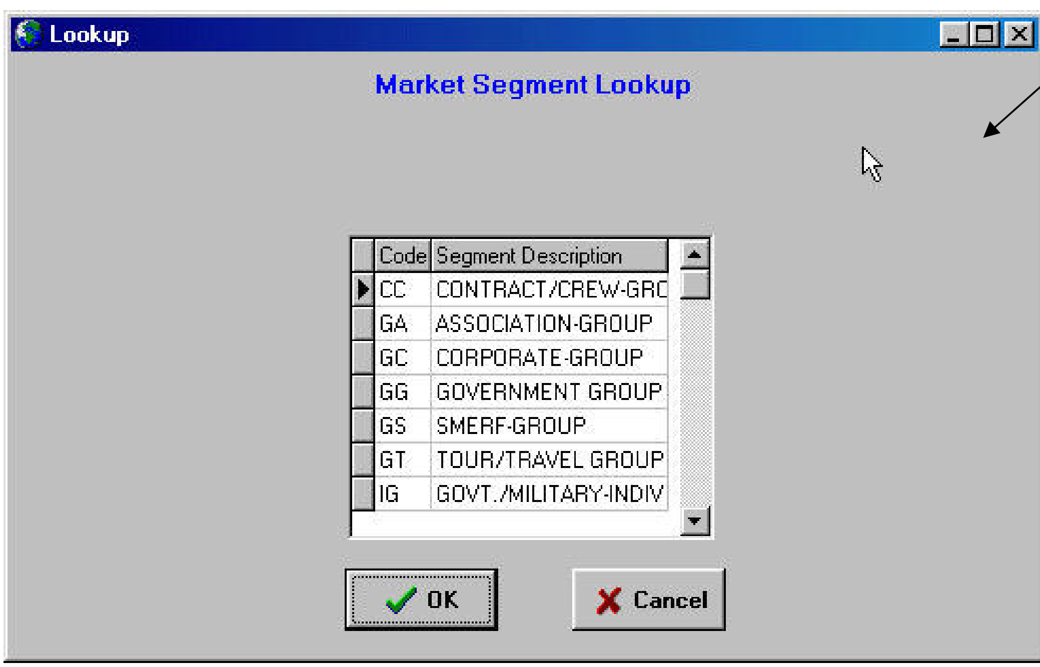
You may use your mouse to select items or you may prefer to use the shortcut keys to navigate through the menu options. To move forward within fields/cells, use the Tab key. To move backwards, press Shift + Tab.



Finally, the system uses "validated fields" to track important information. In "validated fields", the software tests your input to see if it matches the list of *approved answers you have set up in advance*. All validated fields have a “look-up” button you can click to see a list of approved answers.



Validated fields have a “look-up” button. Clicking this button pops up a list of valid choices. (See box below.)



Menu Bar Options/Overview

Following is a brief overview of each menu bar option. For more detailed information, refer to the appropriate section in this guide.

Daily Tracking: This selection allows you to add, edit or delete daily sales tracking activity and/or import daily transactions from the front office system. The information entered here will be used to generate detailed reports in the system.

Accounts: Every account/company you wish to track (plus all pertinent information relating to the company including address, market segment, contacts, corresponding hotel sales representative, rates and specific company comments, etc.) will be set up under this option. Trace and sales calls features are also available through this option. Lastly, company lists may be generated from this main menu option. *(Note: Although the system allows you to add an unlimited number of accounts, many hotels focus on a smaller number of their "key" accounts. If you will utilize the account management features of the system, e.g. sales calls, traces, etc., you should add as many accounts as you wish to manage.)*

Bookings: This section allows you to enter future group rooms business. This information may be merged with a pre-configured Word document to produce a rooms contract and other related correspondence.

Appointments: This section allows you to enter appointments at 1/2 hour intervals. Various views are available allowing you to view your appointments by day, week or month. There is also a tab to access the trace system giving you a centralized screen for managing your appointments/traces.

Reports: This section presents you with options to generate detailed reports with information on companies, market segments, sales calls and group rooms production. Under this option, you are also able to generate Microsoft Word Mail Merge files for your company contacts. This file can be merged with Word documents in order to customize letters, generate labels, among other things.

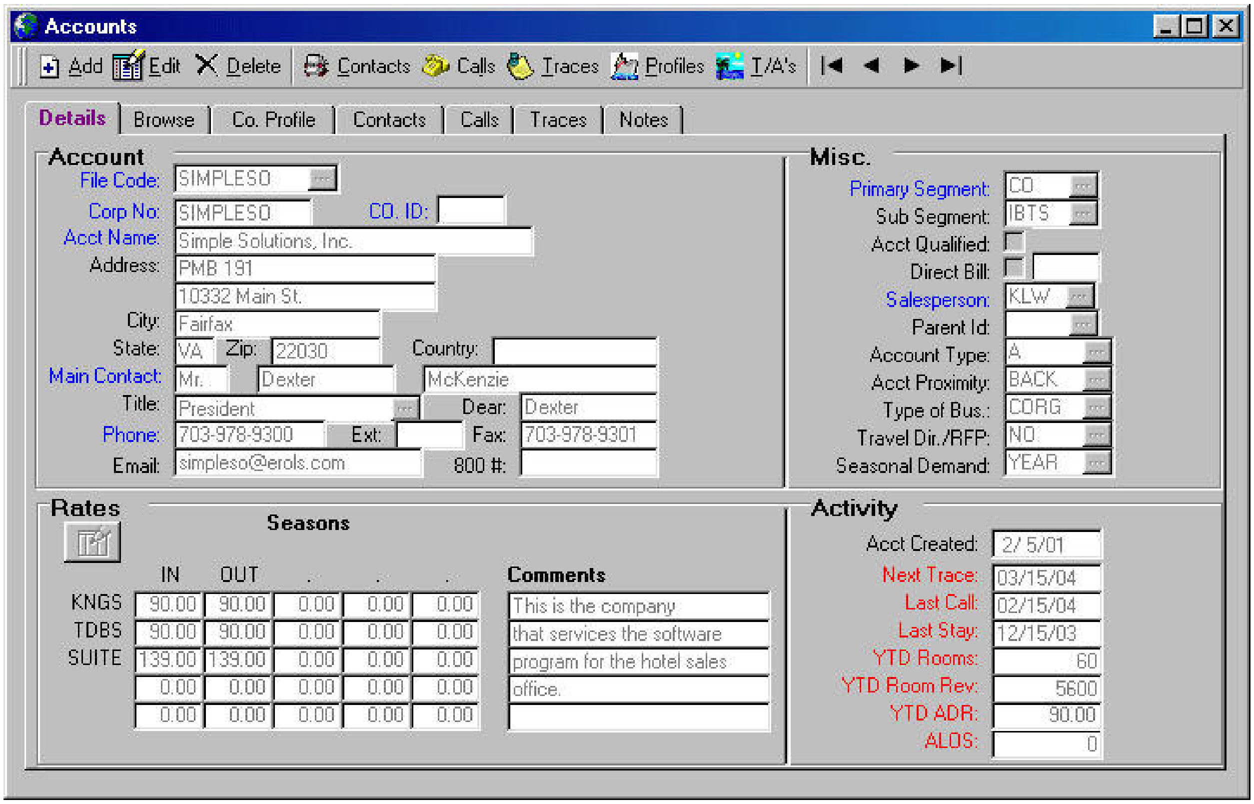
Budget: Budgeted occupancy and ADR by market segment for your hotel is added or edited from this section. These are important as several of the reports generated through STS compare "actual" versus "budgeted" totals. Also, you would add market share information and update competitor/your hotel statistics on a monthly basis through this option.

Utilities: This option allows you to build parameters in STS (e.g. "validated field" databases such as salespersons, market segments, etc., and other functions). When the system is first installed, the system operator will be required to configure some of the Utilities features in order to make the program hotel-specific.

Quit: This feature allows you to exit the program.

Each account (company) you wish to track must be entered individually and assigned a separate file code for tracking purposes in STS. These account files would include pertinent information on the accounts as well as on their contacts.

Once you click on the Accounts option from the menu bar, you will be presented with the following menu: **Add/Retrieve, Print, Sales Calls, Target Accts, Lost Business.** You may click on the submenu option or, if using the keyboard, simply use the up/down arrow keys to highlight the submenu option and press Enter.



Account - Field Overview

When the **Add/Retrieve** Accounts option is chosen, the user is presented with a screen (see above) containing a completed account record, if any records have been added or imported. You are in "View" mode. To add a new account, simply click on the ADD button (top left of screen) and you will be presented with a blank Master Account input screen. If you would like to change any of the account information, click EDIT. Below, please find a description of the individual fields:

File Code: Establish and enter an alpha-numeric code (up to 10 letters and/or numbers) for the account in this field, e.g. SIMP for Simple Solutions, XERX for Xerox, etc.) *It is critical that you complete this field as it will be the company identifier when retrieving data. The file code is the link between your accounts, contact, traces and sales calls.*

Corp. No.: In the **Corp. No.** field, you would enter the same code that was established for the account and entered in the "file code" field. *You need to enter a code in this field if you wish to track your transient business.*

Acct. Name/Address: Next, the company name and address must be entered. Since the system has a mail merge capability, type address (e.g. capitalization, etc.) as it would appear on an envelope. No comma is needed after city name.

Contact: Enter a **main** contact's name for this account. The first field is for a personal title (Mr., Ms., etc.), the next two fields are for first and last name.

Title/Dear: Enter the contact's correct title, if it is known. Only enter a title if you know it to be their correct one. This title will appear on mail merge documents. The Dear field is for how you would normally address them in a letter (Jack or Mr. Smith).

Phone/Ext./Fax: Enter a phone number and fax for the contact or the company.

Web Site/800 #: Enter the company's web site address and 800 number, if applicable.

Primary Segment: This is the primary market code this company would be tracked under. (You may click the look-up button to get a list of valid market segments. Within "look-up", click on correct code then click on "OK" to retrieve. These codes would have been predetermined and entered during the installation process, but may be updated at any time. See Utilities/Table Maintenance/Market Segments.)

Sub Segment: This is the secondary market code this company would be tracked under.

Dir Bill: Check this box if an account has been approved for direct billing. You may also include a dollar amount (no cents) up to which direct billing is approved or use the field to the right to enter an internal direct bill code.

Salesperson: Enter the sales representative (generally initials) who is primarily responsible for this account.

Parent Id: (Optional) This *four letter code* would be used primarily if there are several departments under a major account that you will track separately, (e.g. University of Pittsburgh "Parent Code = UPIT" may have several departments you have set up individual accounts for. The English department may have a unique **file code** but may also be tracked under the UPIT parent code. You may later pull up lists, labels, etc. by these codes. These must be set up in Utilities/Table Maintenance.

User Field 1, 2, 3, 4, 5: These fields allow the user, if desired, to determine additional/alternate ways of categorizing accounts. You may later use these codes to pull up more specific lists, merge files, etc. *(Note: Some fields have been pre-labeled for you.)*

Examples of additional coding options may include:
- *Color coding*, you may track an account as *red* for a "hot" account, etc.
- *Coding "by decision"*, you may include codes like *price*, *location*, among others.
- You may assign *geographic codes* like *southwest*, *northeast*, *northwest*, to name a few.

You must have set up the actual user field descriptions (under Utilities/Configure Hotel Info/Program Config) and the corresponding databases (under Utilities/Table Maintenance).

Rates: This window allows you to enter the established rates for the account. Typically, only "contract" or "negotiated" rates would be entered in this window. The room types listed on the screen were established under Utilities/Configure Hotel Info. There is also a button directly under the word Rates. This button, when clicked, will insert the hotels "published rates". These rates can be set-up under Utilities/Configure Hotel Info/Published Rates.

Comments: In this field, you may type in bullets of information pertinent to this account. These lines of text do not scroll. To add additional notes for a specific account, choose the Notes tab (bottom left of the screen).

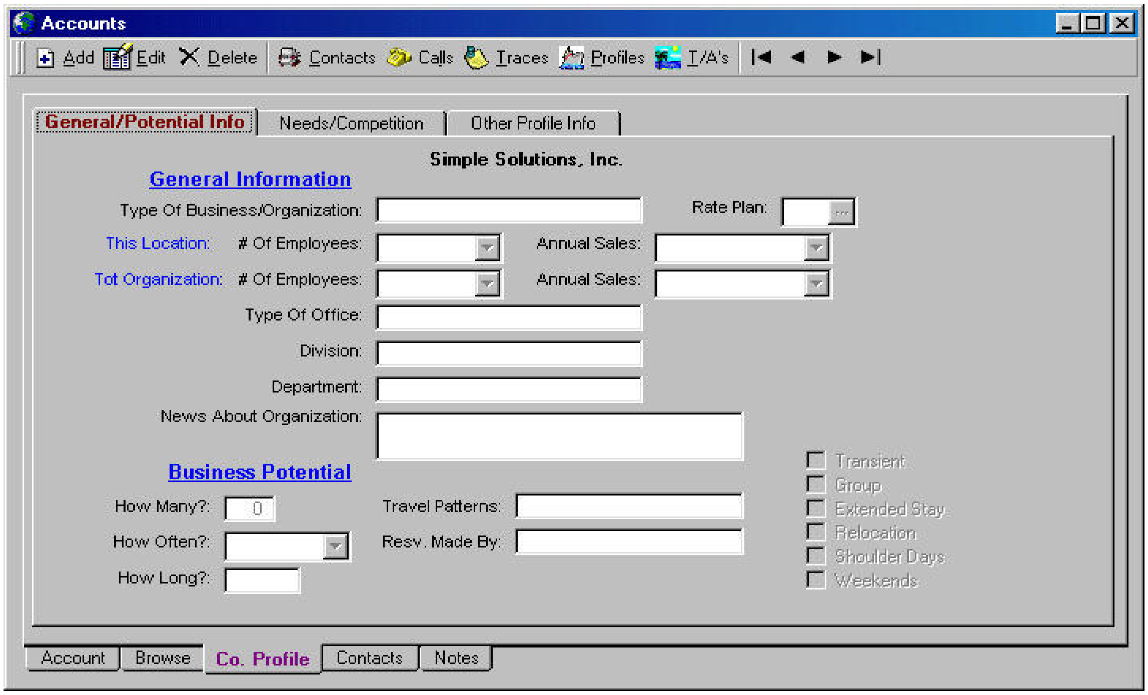
Acct Created: Enter the date you created this account.

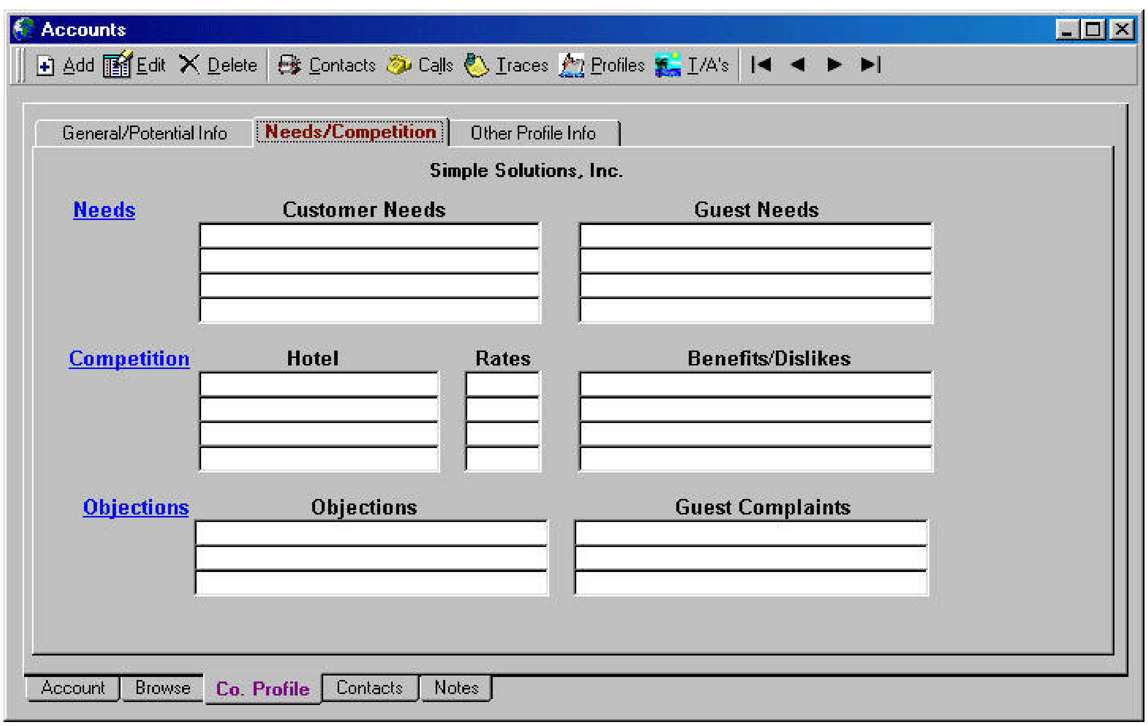
Activity: These fields are "view only" fields as they display the last time a sales call was entered for this account in addition to the last time the account stayed with you, etc. Certain fields, like ALOS (average length of stay), will only be populated with an interface to the property management system.

NOTES: While adding a new account or editing an account, you may click on **Notes** tab to access a larger notes window. The Comments fields should be used first to capture important notes for an account. Notes should be used as an overflow for the Comments fields. The Notes tab is lightened to indicate that you are now working within this area. *Do not enter sales call information in the Notes section. That information should be entered in a Sales Call (see Sales Calls).* Simply type in the notes/additional comments, then click back on the Account tab (bottom left of screen) to return back to the Add Master Account screen.

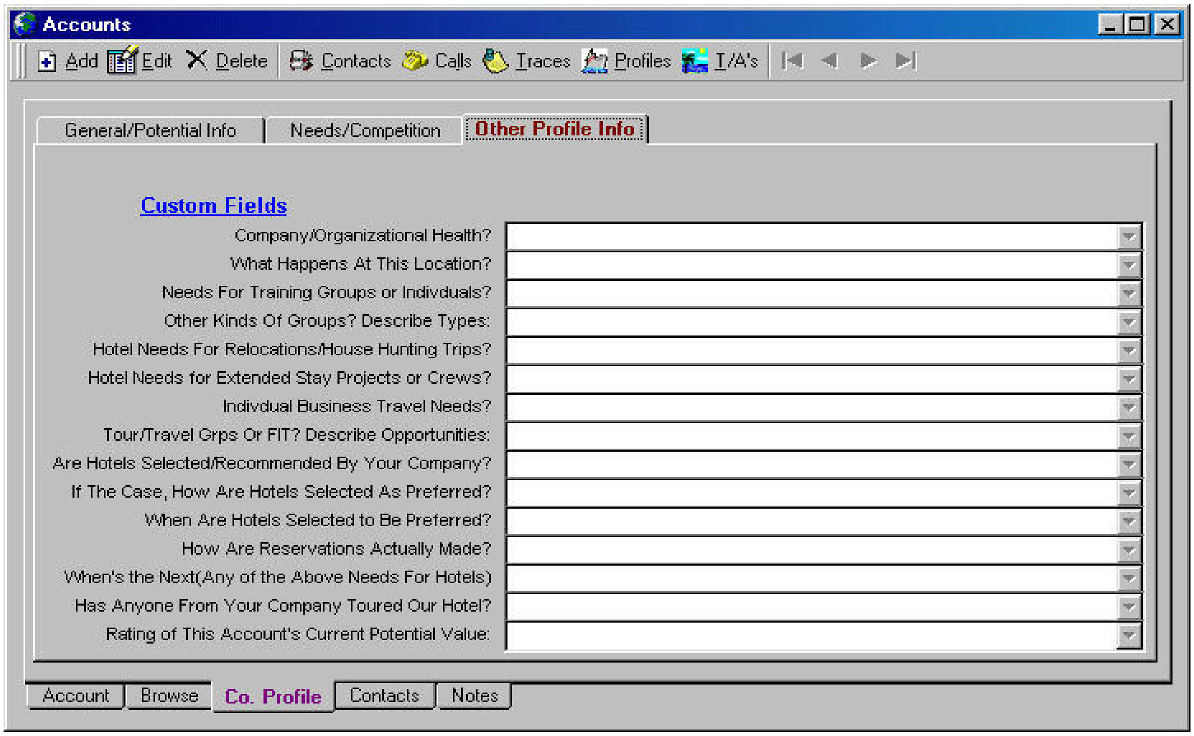
<u>CO. PROFILE</u>: (Collection of the "Profile" information is optional.) You may click on **Co. Profile** tab to access an account profile screen. There are three different tabs on the Co. Profile tab.

- General/Potential Info
- Needs/Competition
- Other Profile Info/Custom Profile Fields





Company Profile – Custom Fields



The Other Profile Info tab has 15 custom fields that can be configured by the hotel. You can change the description of these fields by click **Utilities | Configure Hotel Info | Custom Profile tab**. This screen allows you to type in a description of each of the fields you would like to utilize. You may then create drop down responses by clicking **Utilities | Table Maintenance | Account Custom Profile Fields**. Creating drop down responses can speed up data entry and provide consistent answers to the configured questions. You can still type a response, in the field, that is not listed in the drop down. Finally, certain hotel companies have standardized on the descriptions and drop down responses. If this is the case for your hotel you should contact your regional/corporate sales support person prior to changing these fields.

Once you have typed in the data requested to maintain pertinent information for the account, click back on the Account tab to return back to the Add Master Account screen.

CONTACTS: You may click on **Contact Tab** to access a "view only" contact screen for this account. This tab is only available when you are in “View” mode. The Contact Tab will not operate if you are Adding or Editing an account. You may open the Contact screen by double clicking on a contact listed in the grid. You can also access the complete contact module (to add/edit contacts) by clicking on the Contact button on the top of your screen.

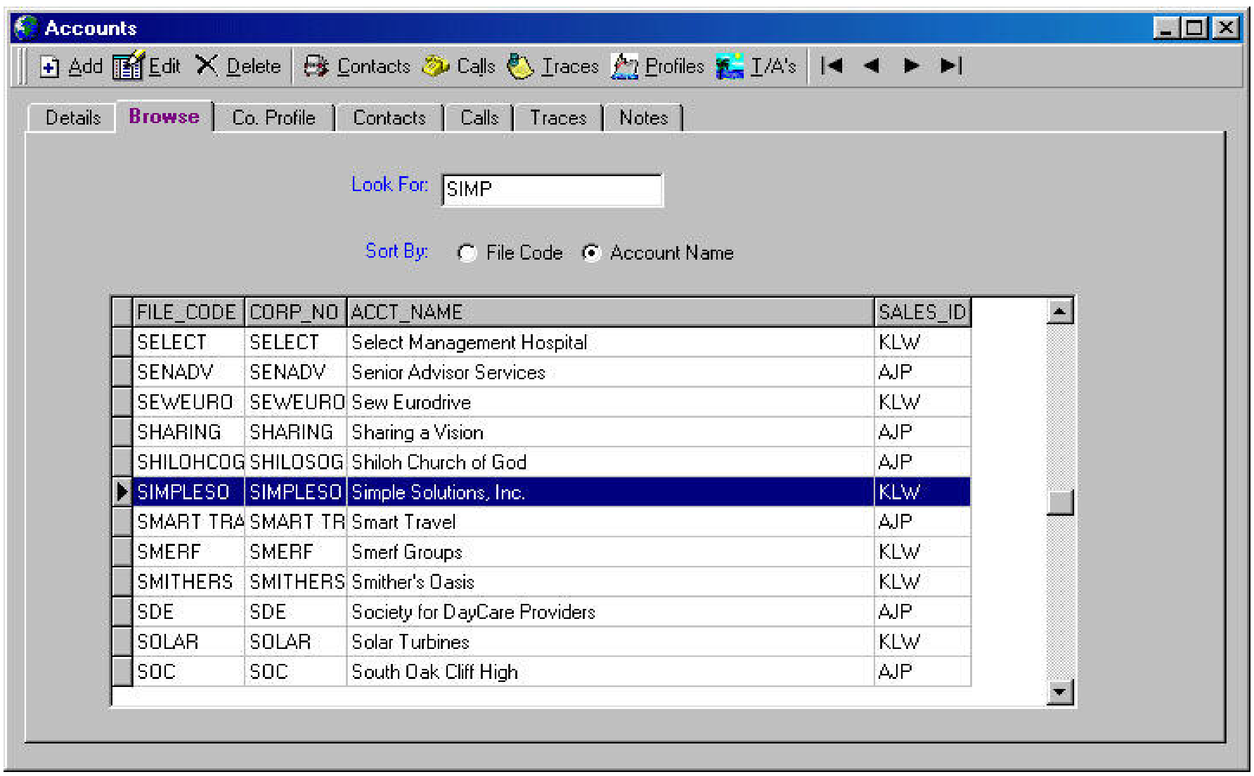
When all applicable fields have been completed on the ADD MASTER ACCOUNT screen, click on "OK" (top right of screen) to save new account information.

Once an account has been added, you may then add the companies' contact(s), sales calls, and/or traces.

There are several ways to ***retrieve/locate an account*** *once it has been added to the system:*

Browse Tab: This option would be used if there are numerous accounts in your system. While on the Master Account screen, click on the Browse tab. You may now browse through the scrolling list of accounts to retrieve a specific account.

You **search** for an account by clicking on the **Look For:** field. Start typing the name of the account you are looking for. The program will quickly find matches for the letters you have typed. You can search by File Code or Account Name by changing the Sort By: option below the Look For: field. The browse option is generally the fastest way to retrieve an account. Within the browse screen, you may also click on the elevator bar arrows (right center of screen) to move the list up or down. You may also move through the list by *dragging* the elevator button on the right.



Once you locate the account within the browse window, simply double click on the account name to return to the Master Account Screen. You will notice that the account you have selected is now retrieved to the screen. At this time, you may Add Contacts, Sales Calls or Traces to the Account or you may choose to Edit or Delete the account.

VCR buttons: (Four arrow buttons on top right of Master Account screen.) While on the Master Account screen, you may click on left arrow VCR buttons to go to the *previous* account record or to the *first* account record. By clicking on the right VCR buttons, you can move to the *next* account record or the *last* account record available. These would be useful if there are a *limited* number of accounts in the system.

Once the account is retrieved to the Master Account screen, you may Add Contacts, Sales Calls or Traces to the Account or you may choose to Edit or Delete the account.

Adding Accounts-Recap (under Accounts-Add/Retrieve)

To add a new account, simply click on the ADD button (top left of screen) and you will be presented with a blank Master Account input screen. You may move around the fields by using the Tab key (to move forward) and Shift+Tab keys (to move backwards). If an item is entered incorrectly, simply type over the entry with the correct information. To recap:

1. Go to the Account (Add-Retrieve) screen and click on Add.
2. Fill in all pertinent information on the first screen (see field descriptions on the previous pages). If you would like to enter account profile, click on tab at bottom of screen. After you have entered the profile information, click on the account tab to return to the main account screen. Click the "OK" button to save info.

Editing Accounts (under Accounts-Add/Retrieve)

At times, it may be necessary to edit/modify previously input information related to a specific account. To edit the information, you would first retrieve the account to the screen. This may be done by using one of the aforementioned options (browse or VCR buttons). Once the account information is retrieved to the screen, click on the Edit button. Move around the fields by using the Tab (to move forward) and Shift+Tab keys (to move backwards). You may edit/modify the fields by typing over the existing information. Remember, *if any field or screen (profile, notes) has been altered, click on "OK" (top right of screen) to save changes*.

Deleting Accounts (under Accounts-Add/Retrieve)

To delete an account from the system, you would first retrieve the account to the screen. This may be done by using the browse or VCR button options. Once the account information is retrieved to the screen, ensure that it is the account that you wish to delete. Next, click on the Delete button. When prompted, *click on "OK" to complete the deletion*. **Deleting an Account will also delete any Contacts, Sales Calls and Traces that belong to the account.**

Listing Accounts (under main menu bar option Account)

This feature allows you to generate alphabetical lists of the accounts in the system:

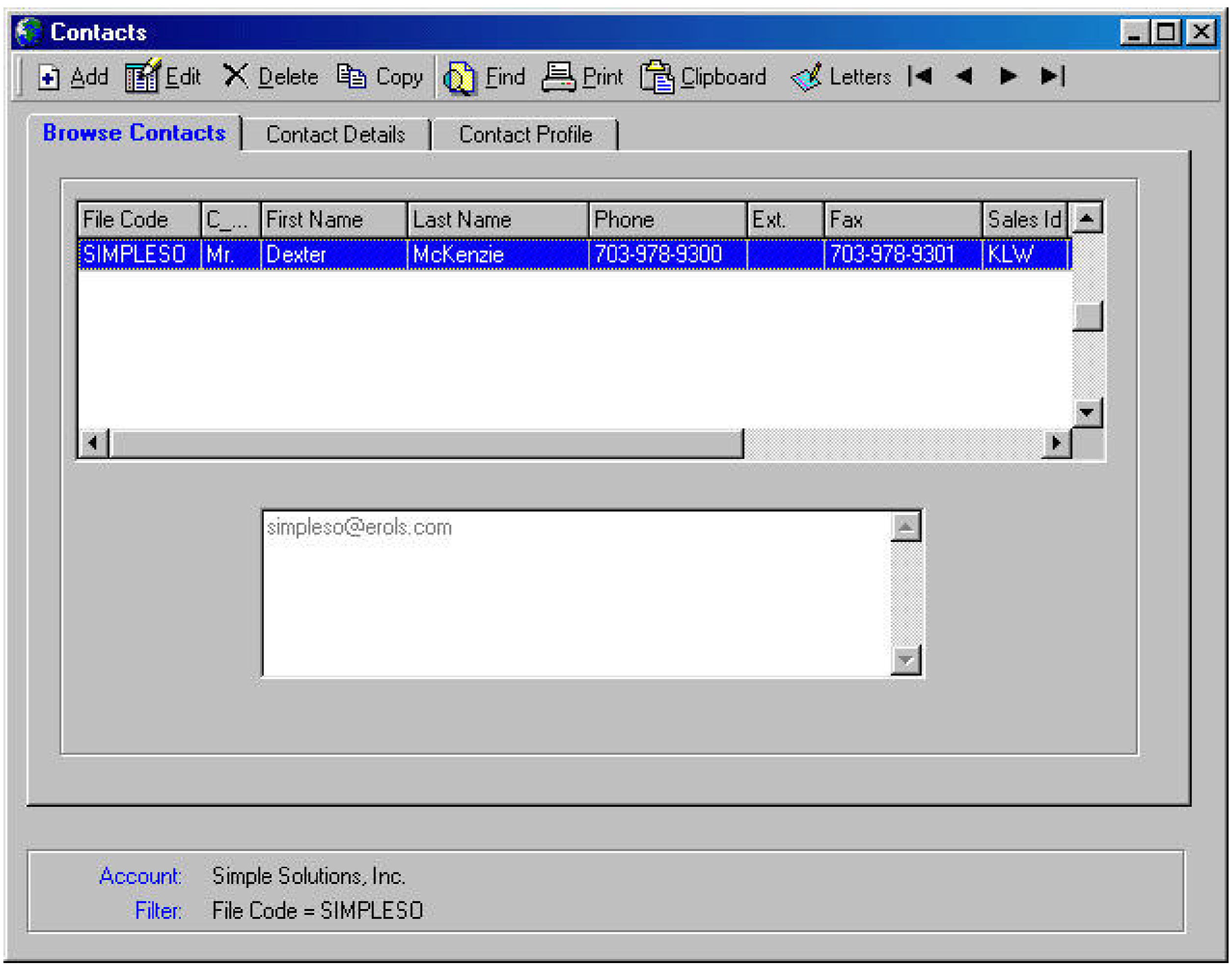
After clicking **Accounts | List** you will be presented with various account list formats. After choosing one you will be presented with an Account List filter screen. This screen allows you to control which accounts are printed. If you would like all Corporate accounts only then enter the code for Corporate in the Market Segment: field and click OK. The list will be printed to the screen.

The Account List filter screen if very powerful as it allows you to enter any number of filter criteria. The more fields you fill in the shorter the list will be. You may also control the Order the list prints in by changing the Order List By section.

CONTACTS

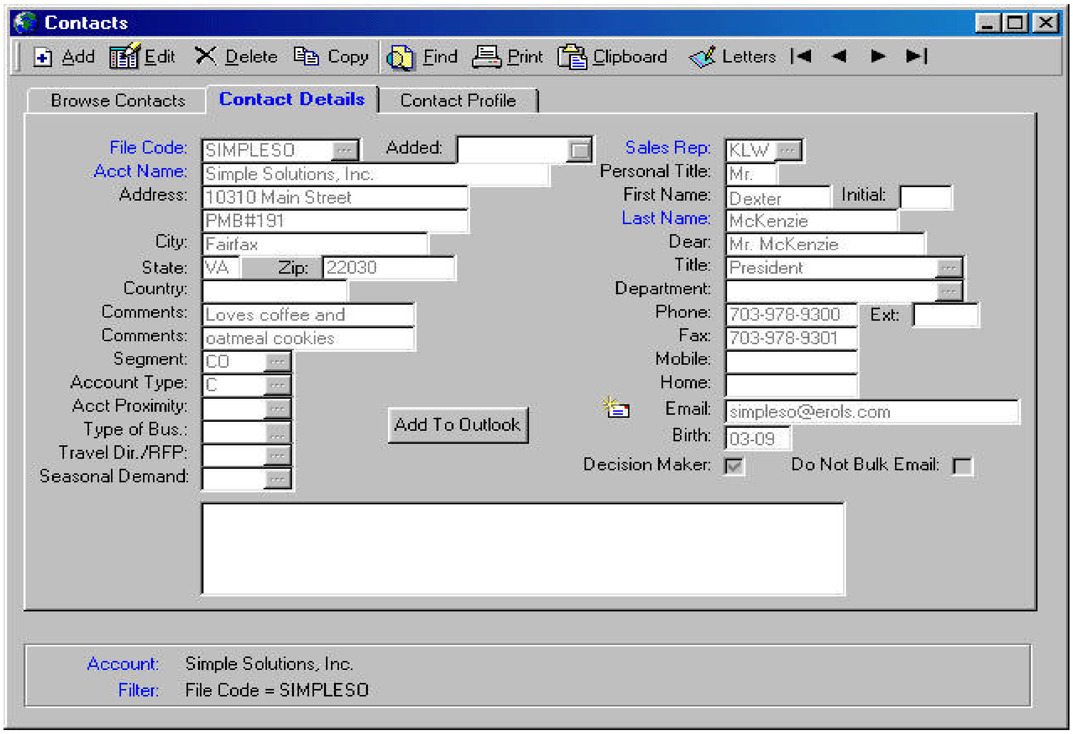
From the main menu bar, click on Accounts, then choose Add/Retrieve. The Contacts button is located on the Master Account screen. In order to add/edit/delete **CONTACTS** for an account, you should first locate and retrieve the account using either the Browse function (bottom left of Master Account screen) or VCR buttons (top right of Master Account screen). These features are explained under the Accounts-Add/Retrieve section of this user's guide.

When the account is retrieved to the screen, click on the Contacts button (or Alt + C). You will then be presented with the scrolling contact screen (below) and contact menu options.

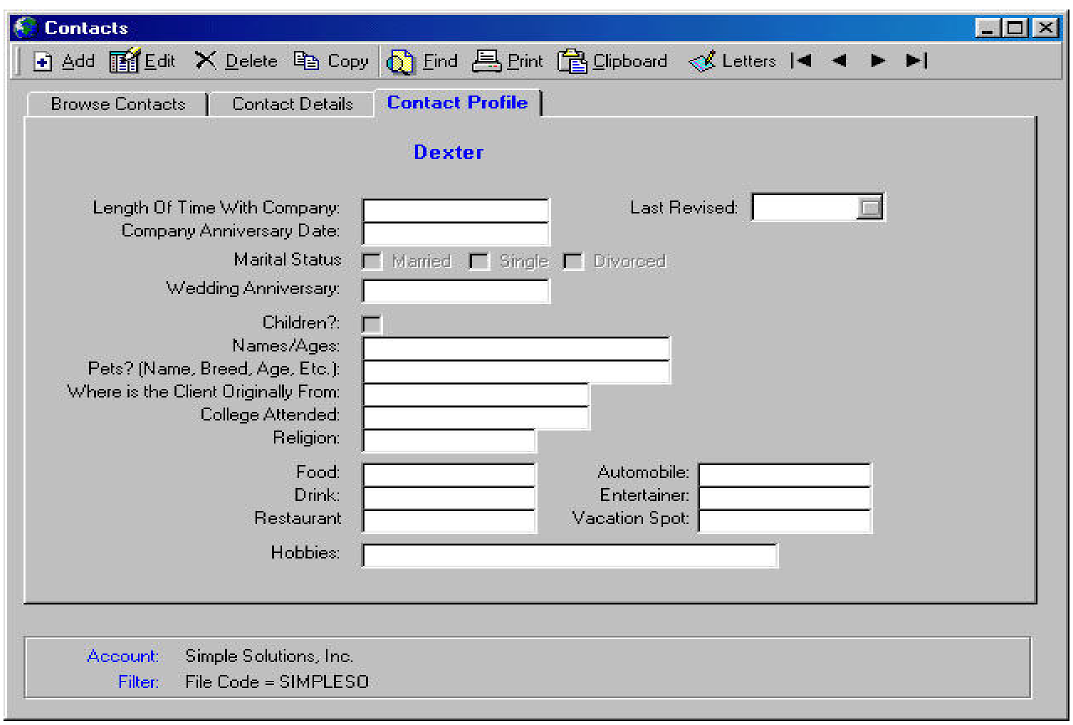


ADD CONTACTS: When you click on Add, an Add Contact screen will be retrieved (next page). You may add an unlimited number of contacts for each account. Move around the fields by using the Tab key (forward) and Shift + Tab key (to move backwards).

CONTACTS – ADD *continued*



ADD TO OUTLOOK: The Add To Outlook button will add the displayed contact to the default address book in Microsoft Outlook. **The button does not work if you are using browser based email versus having the full version of Outlook installed on your computer.**



Fill in the fields and click OK to save. You cannot add a contact without filling in the File Code, Account Name, Sales Rep., First and Last Name. You should fill in as many of the other fields for which you have information.

CONTACTS – *continued*

<u>EDIT CONTACTS</u>: Highlight the contact you would like to edit on the Browse Contact screen and click the **Edit** button**.** You may change any data by typing over the previous entries. If edited, click the "OK" button to save changes.

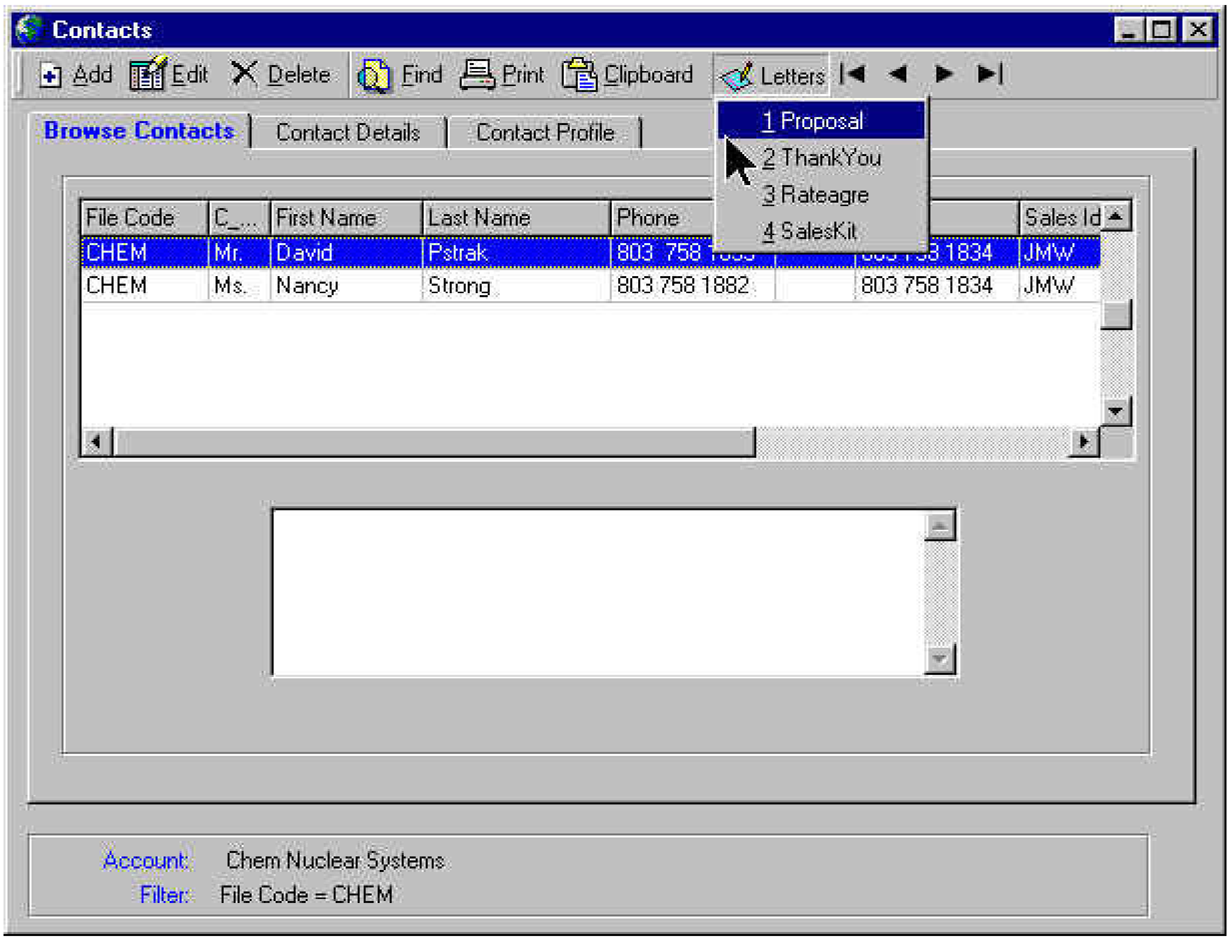
<u>DELETE CONTACTS</u>: Highlight the contact you would like to delete on the Browse Contact screen and click the **Delete** button**.** You will be asked to confirm the deletion.

<u>FIND CONTACTS</u>: The Find button allows you to quickly locate a contact. From the Browse Contact tab, click the Find button and enter the search criteria. For example, you can search by File Code, **part** or all of the Account Name and/or **part** or all of the contacts's Last Name. When searching by Account Name or Last Name, enter only the beginning of the name. This will minimize entering a misspelled name. Clicking OK without filling in any fields will display ALL contacts in the database.

<u>CLIPBOARD</u>: You can copy contact name/address information from the Contact Screen to any Windows application (including Word). Locate and highlight the contact you would like to copy. Click the Clipboard button. Once in Word, click your right mouse button and choose "Paste" with the left mouse button. The information will be pasted into your Word document in the format as if you were beginning a letter to the contact.

CONTACTS – ***continued***

LETTERS: The Letters button on the toolbar allows you to choose a letter, from the drop down menu, that you would like to send to the highlighted contacts. The Letters button is available on the Contact and Sales Call screens.

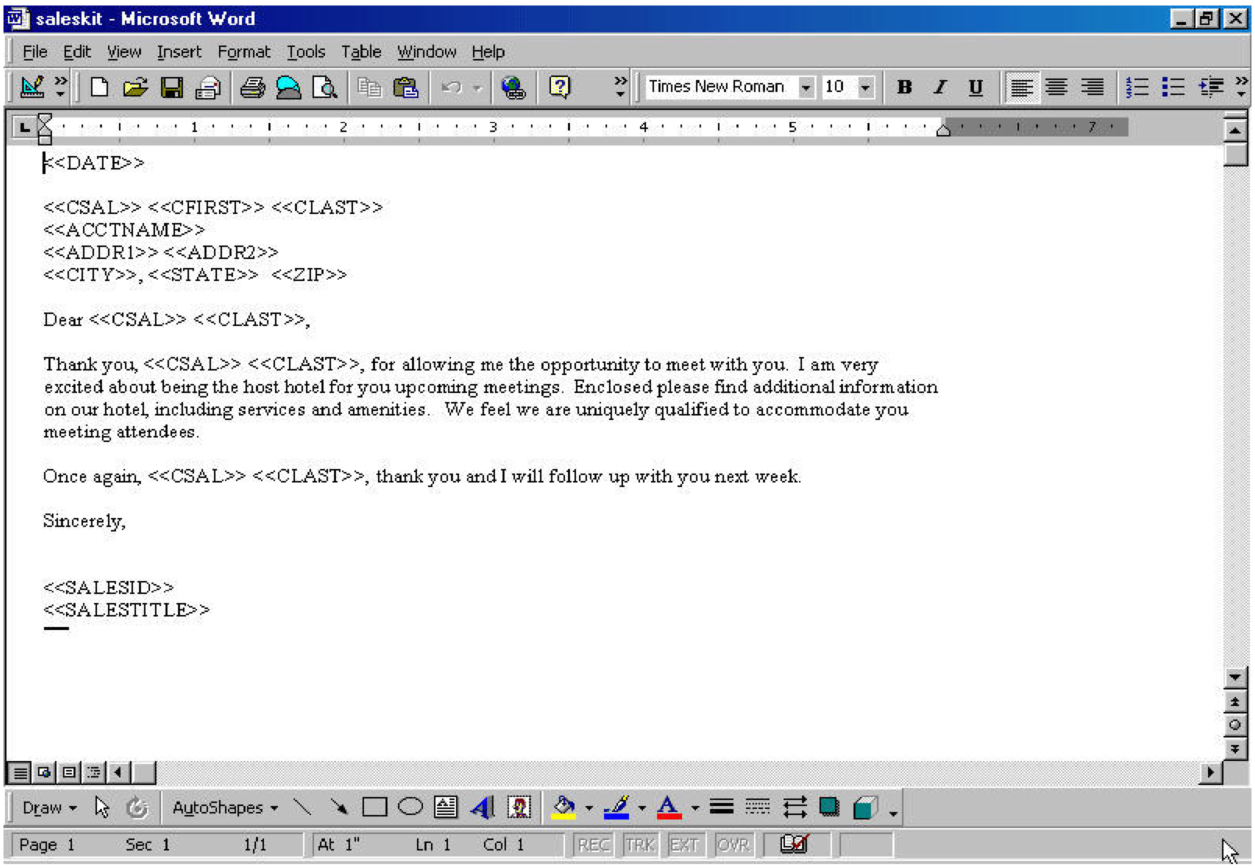


Once you choose a letter, Microsoft Word will be launched and the letter loaded. The contact's name and address information will automatically be inserted into the document where you have placed the merge tags. This feature allows you to create template letters you regularly send to clients and have them available with a few clicks of the mouse.

By default, letters you create must be saved in the C:\STS\LETTERS folder on your local hard drive. If you are using STS on multiple computers on a network the letters should be saved to the C:\STS\LETTERS folder on the main computer acting as the Server. This allows you to easily maintain one template for all users.

LETTERS: You type merge tags (see below) in your letter where you would like contact information to appear. It is important to type the tags in exactly as they are listed. Once the tags are typed into the letter, save the letter to your C:\STS\LETTERS folder if you are working from the Server computer. There is a limited amount of space for the document name so keep the name of the document to 20 characters or less. Also, do not use punctuation in the document name.

Once you have saved the letter you can add the letter to the drop down list by clicking Utilities | Table Maintenance | Letters. ***When adding a letter to the list in STS always end the document in .DOC. If you named a document PROPOSAL in Word, the document name in STS would be PROPOSAL.DOC.***



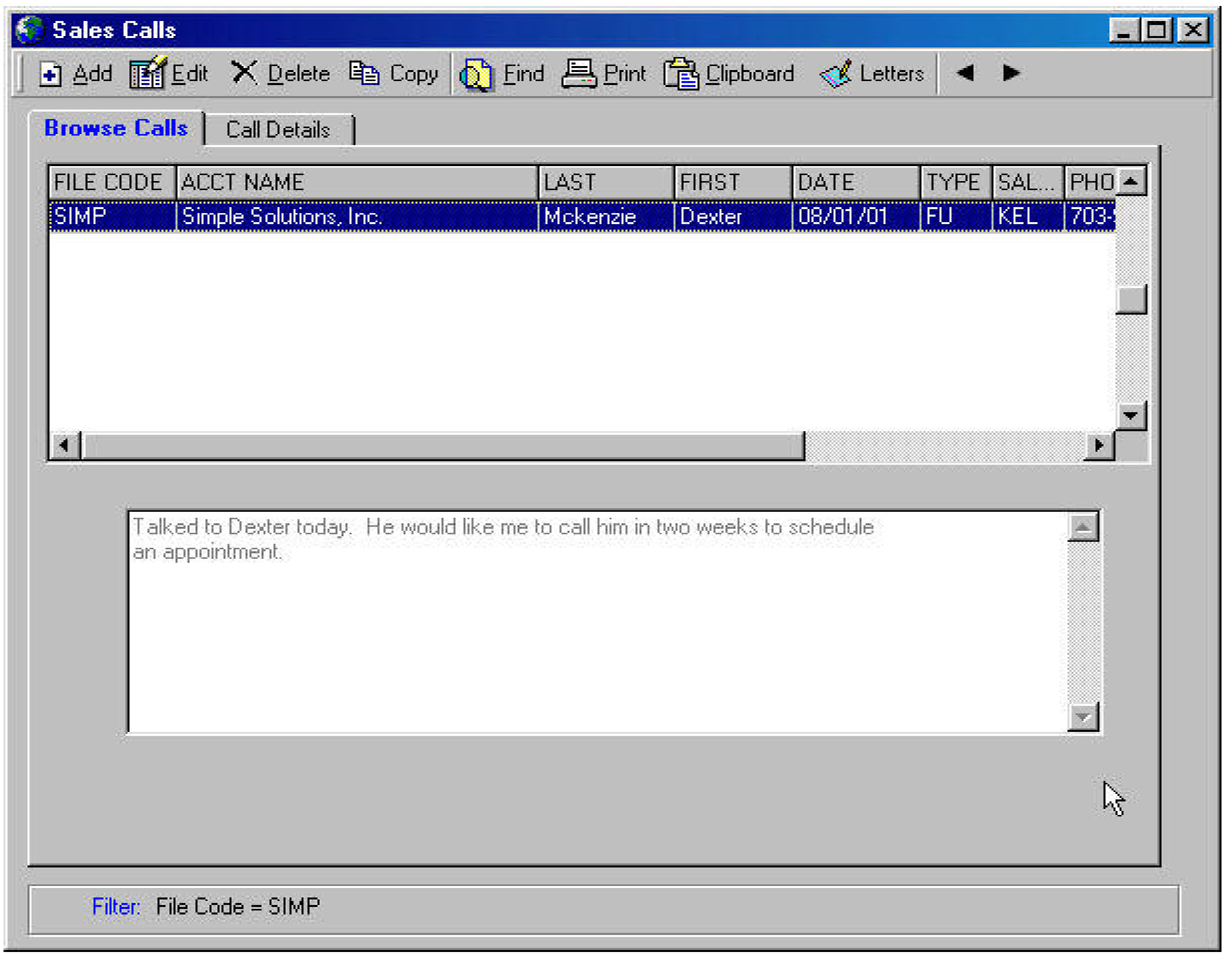
Valid Merge Tags

TAG	DESCRIPTION	TAG	DESCRIPTION
<<DATE>>	Date (ie. June 22, 2001)	<<ADDR1>>	Contact's 1st Address Line
<<FILECODE>>	Account File Code	<<ADDR2>>	Contact's 2nd Address Line
<<ACCTNAME>>	Account Name	<<CITY>>	Contact's City
<<CSAL>>	Contacts Personal Title (Mr., Ms., etc.)	<<STATE>>	Contact's State
<<CFIRST>>	Contacts First Name	<<ZIP>>	Contact's Zip Code
<<CLAST>>	Contacts Last Name	<<EMAIL>>	Contact's Email
<<CPHONE>>	Contacts Phone Number	<<SALESID>>	Sales Person name
<<CEXT>>	Contacts Extension	<<SALESTITLE>>	Sales Person Title
<<CFAX>>	Contacts Fax Number	<<SALESPHONE>>	Sales Person Phone
<<CTITLE>>	Contacts Title	<<SALESEXT>>	Sales Person Extension
		<<SALESEMAIL>>	Sales Person Email Address

SALES CALLS

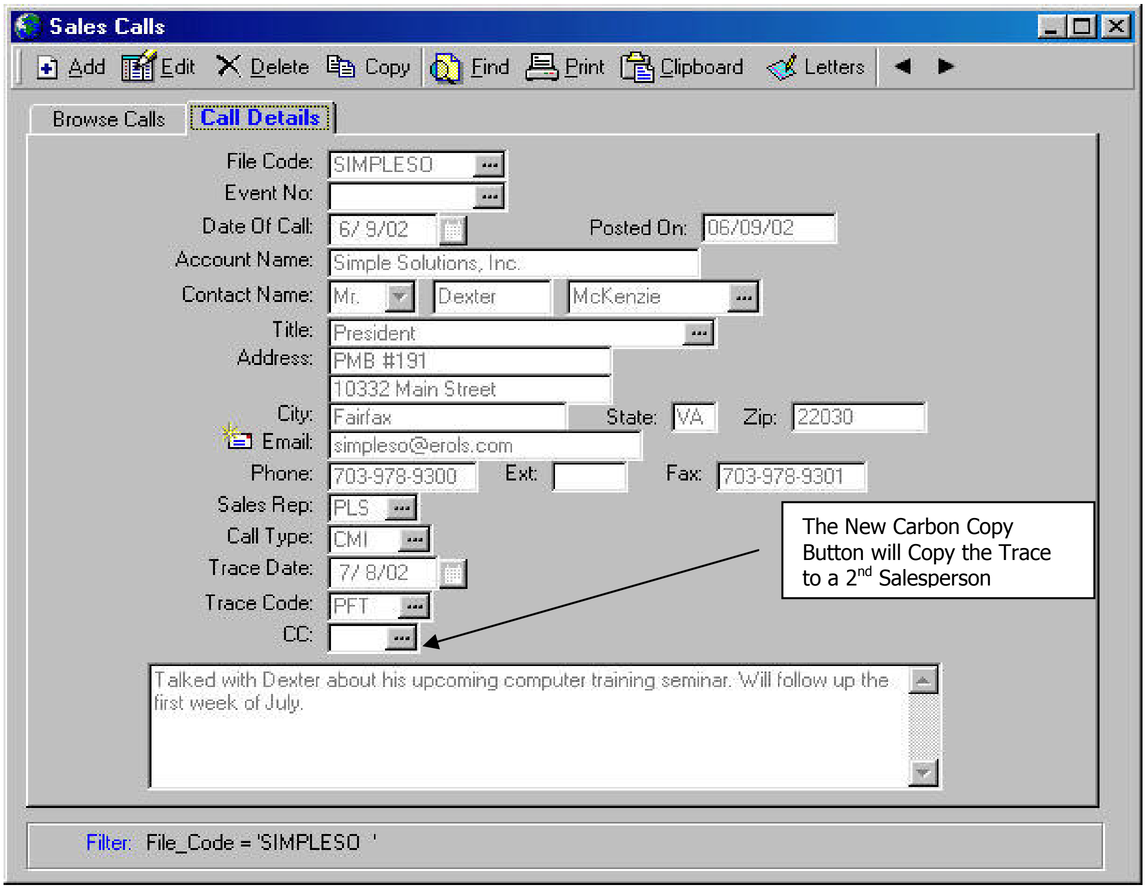
The sales call section of STS is designed to automate the collection of information that is generally recorded on a Sales Call Report. As traces are a tickler file for *future* action, sales calls record *past* actions. For ease of use, and in order to better manage accounts, the system allows the user to view or print out sales calls for a specific salesperson, for a specific range of dates, etc.

From the main menu bar, click on Accounts, then choose Add/Retrieve. While on the Master Account screen, click on the **Calls** button to retrieve the Sales Call options/functions and scrolling sales call screen. STS will automatically filter the list of calls to show you only calls for the account that was on the screen when you clicked the Calls button. You can change this list easily and find calls for any account and/or contact by using the Find button.



<u>**ADD CALLS**</u>: When in the scrolling sales call screen, click on the **Add** button to add sales calls for a specific account. You will be presented with the following input screen. To move forward in the cells, use the Tab key. To move backwards, press Shift+Tab. Complete all *applicable* fields. Remember to click "OK" to save input.

SALES CALLS – ADD *continued*



Fill in the appropriate fields and click the "OK" button to save. Remember you can click the "look-up" button on those fields that are validated to pop up a "look-up" list of valid answers. The "look-up" button on date fields pops up a calendar allowing you to "double click" on a date to choose. The notes window at the bottom can hold an unlimited amount of text for each call.

It is very important to trace your calls if appropriate. STS will automatically attach the notes from the call to your future trace. This minimizes your steps to prepare for return calls as the notes from the last conversation will be attached to the trace.

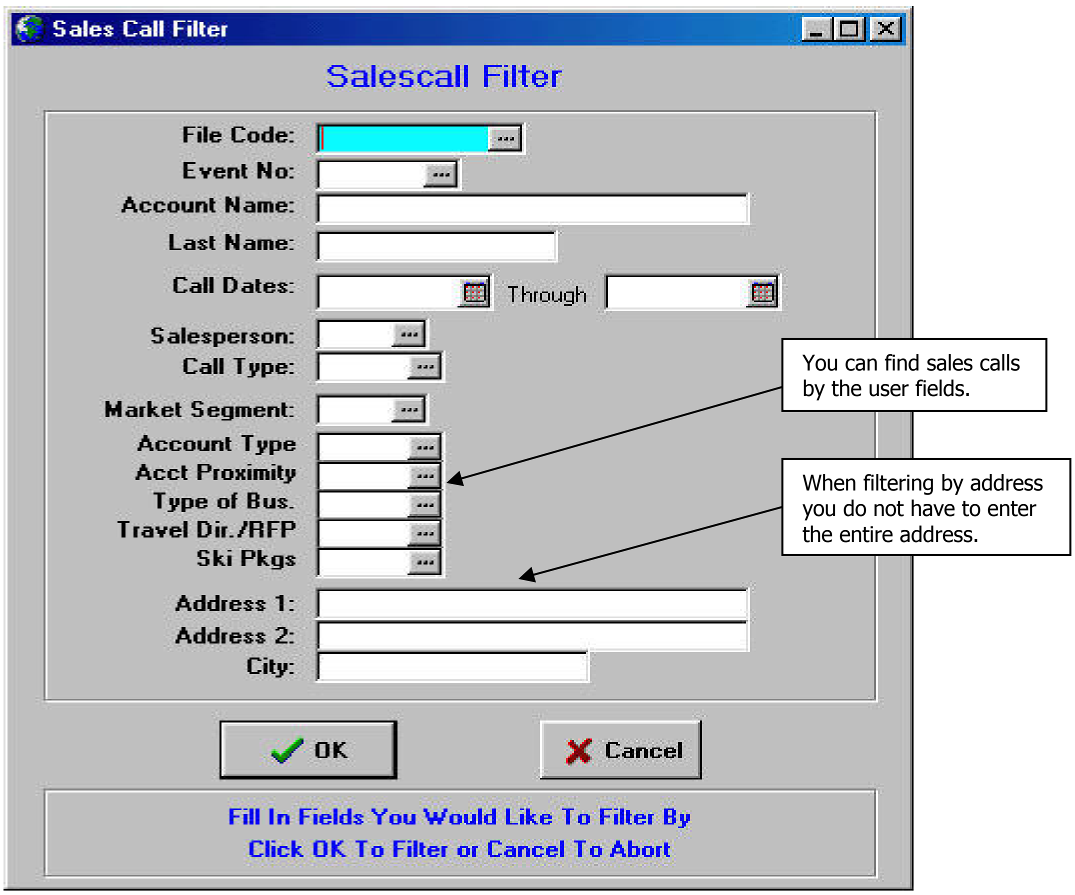
EMAIL Field: The email field allows you to enter a contact's email address. Clicking the letter icon to the left of the field will automatically open your default email program and fill in the "To:" field with the contact's email address.

EDIT CALLS: Highlight the call you would like to edit on the Browse Calls screen and click the **Edit** button**.** You may change any data by typing over the previous entries. If edited, click the "OK" button to save changes.

DELETE CALLS: Highlight the call you would like to delete on the Browse Calls screen and click the **Delete** button**.** You will be asked to confirm the deletion.

SALES CALLS *continued*

FIND CALLS: The Find button allows you to quickly locate a call. From the Browse Call tab, click the Find button and enter the search criteria. You can search by File Code, part or all of the Account Name, Address and/or part or all of the contacts's Last Name, range of dates, salesperson and call type. When searching by Account Name or Last Name enter only the beginning of the name. This will minimize the chances of entering a misspelled name. You can also perform a search on the address fields by only entering part of an address (e.g. entering MAIN on the Address line will show all calls made to accounts with the word MAIN anywhere in the address line).

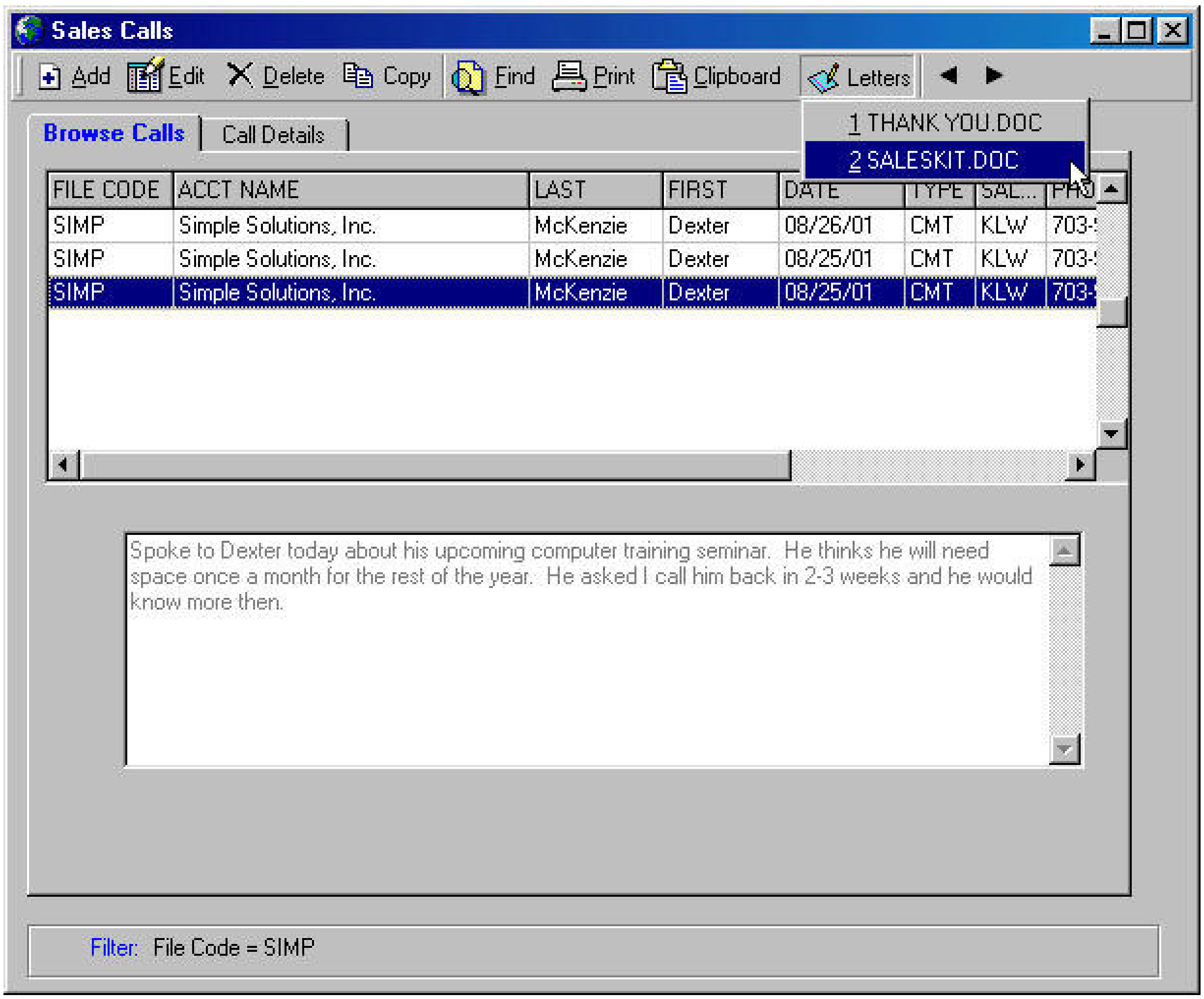


CLIPBOARD: You can copy contact name/address information from the Sales Call Screen to a document in Word. Locate and highlight the contact you would like to copy. Click the Clipboard button. Once in Word, click your right mouse button and choose "Paste" with the left mouse button. The info will be pasted into your Word document in the format as if you were beginning a letter to the contact. This can be very helpful in quickly generating a letter after a sales call. It is recommended you create some boiler plate sales call letters and save them without the address block at the top of the letter. You can then open one of the these letters and paste a contact's name and address which you copied to the clipboard from the sales call screen.

PRINT: You can print a sales call report by clicking the print button. You will be presented with a Find screen. You have to identify how much information you would like on the report. If you would like a weekly sales call report, you would enter the beginning and ending dates and your initials under salesperson. The more information you enter on the Find screen the more specific the report will be.

SALES CALLS *continued*

LETTERS: The Letters button on the toolbar allows you to choose a letter, from the drop down menu, that you would like to send to the highlighted contact. The Letters button is available on the Contact and Sales Call screens.

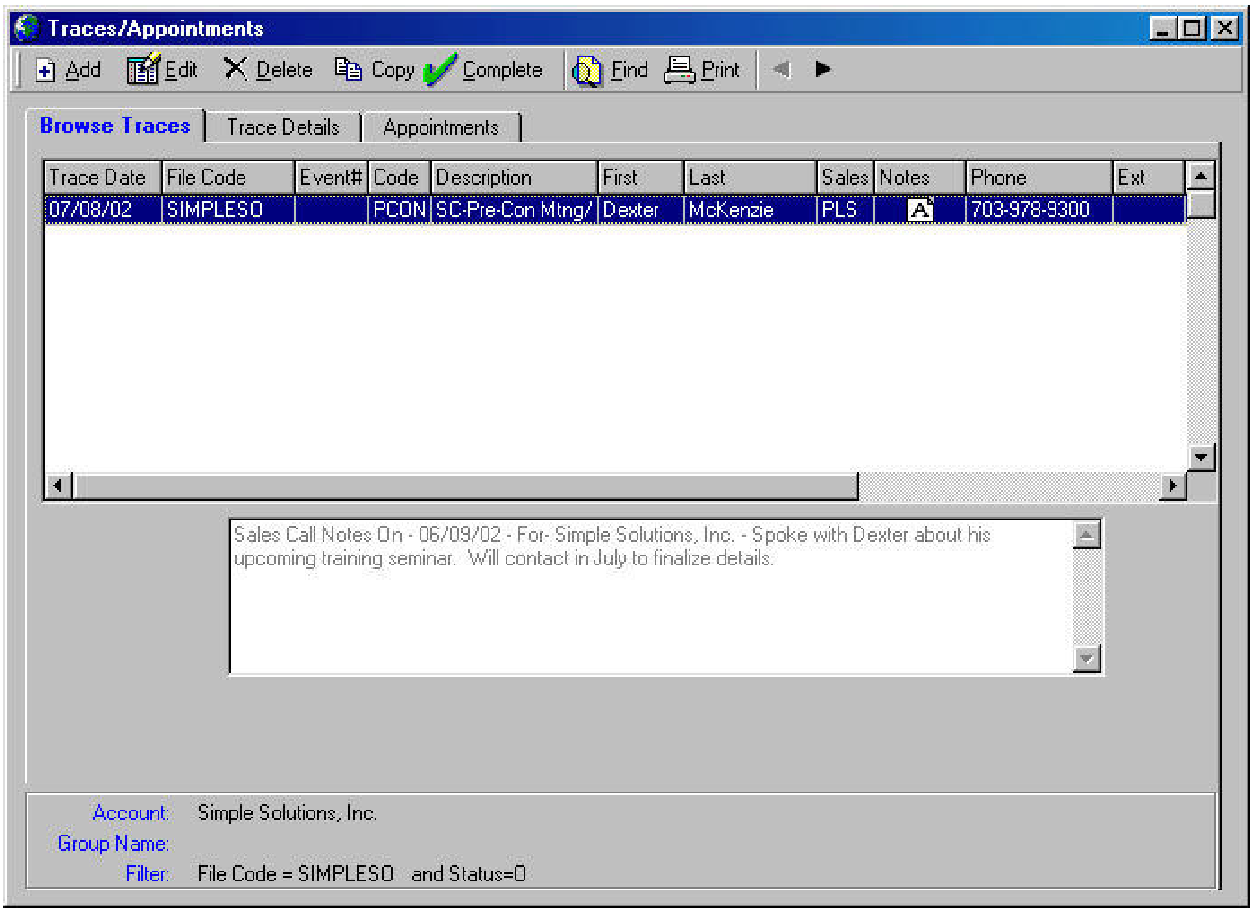


Once you choose a letter, Microsoft Word will be launched and the letter loaded. The contact's information will be merged into the document at the location of the merge tags. This feature allows you to create template letters you regularly send to clients and have them available with a few clicks of the mouse.

TRACES

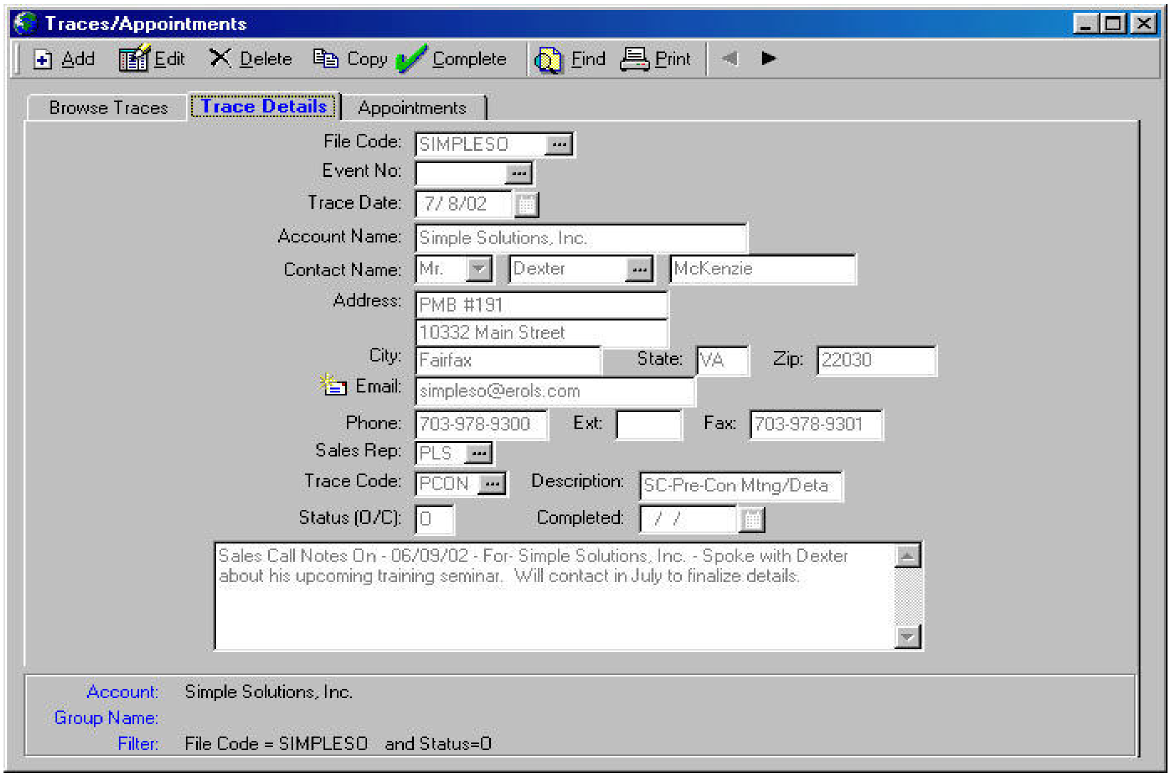
The trace section of the Sales Tracking System is designed to be utilized like an automated tickler file for better account management. Typically, traces would be entered to remind you of future actions that must be taken. Examples of traces would include sending a thank you, sending a notice of deposit due, sending a cut-off date notice, among others. *Many traces will be automatically entered for you from the Sales Call and Group Booking Screen.*

From the main menu bar, click on Accounts, then choose Add/Retrieve. While on the Master Account screen, click on the **Traces** button to retrieve the Traces options/functions and scrolling Trace screen. STS will automatically filter the list of traces to show you only traces for the account that was on the screen when you clicked the Traces button. You can change this list easily and find traces for any account and/or contact by using the Find button (see Find below).



<u>ADD TRACES</u>: When in the scrolling trace screen, click on the **Add** button to add traces for a specific account. You will be presented with the following input screen. To move forward in the cells, use the Tab key. To move backwards, press Shift+Tab. Complete all *applicable* fields. Remember to click "OK" to save input.

TRACES – ADD *continued*



Fill in the appropriate fields and click the "OK" button to save. Remember you can click the "look-up" button on those fields that are validated to pop up a "look-up" list of valid answers. The "look-up" button on date fields pops up a calendar allowing you to "double click" on a date to choose. The notes window at the bottom can hold an unlimited amount of text for each trace.

<u>EDIT TRACES</u>: Highlight the trace you would like to edit on the Browse Trace screen and click the **Edit** button**.** You may change any data by typing over the previous entries. If edited, click the "OK" button to save changes.

<u>COMPLETING TRACES</u>: Highlight the trace you would like to close on the Browse Trace screen and click the Complete button. You will be asked to confirm the completion. Completing a trace only changes the status from Open to Closed and removes it from your open trace list. You can still find a closed trace utilizing the Find button and searching for traces with a C(losed) status. You can also complete multiple traces simultaneously. Highlight the first trace. Hold the Shift key down and press the down arrow. Highlight multiple traces. All of the highlighted traces will be closed when you click the Complete button and answer Yes.

Finally, when completing a trace, you will be asked if you would like to Add A New Call. If you answer Yes the Add Sales Call screen will appear. The fields will be automatically filled in with the information from the Trace screen.

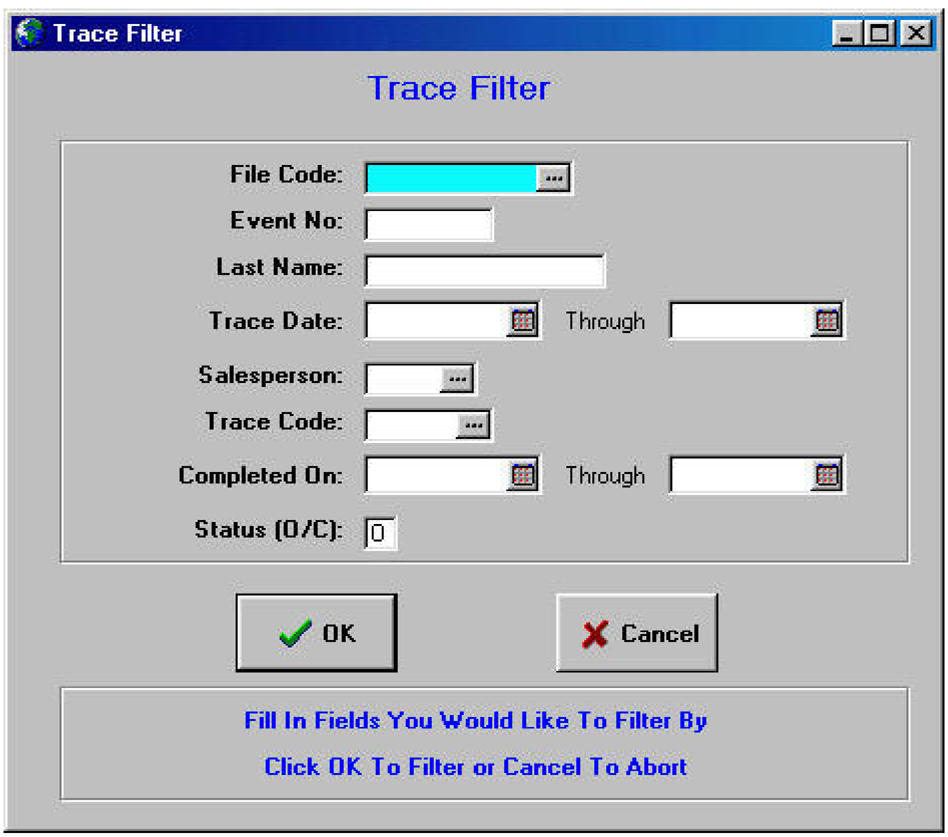
It is very important you complete traces on a regular basis. Traces which you have actually completed, but not marked accordingly in STS, will prohibit you from properly utilizing the trace system.

TRACES ***continued***

DELETE TRACES: Highlight the trace you would like to delete on the Browse Trace screen and click the **Delete** button**.** You will be asked to confirm the deletion. *In most cases you would not delete a trace but rather mark it complete.* Deleting a trace erases it permanently. Completing a trace only changes the status from Open to Closed and removes it from your open trace list. (You can Find a closed trace.)

FIND TRACES: The Find button allows you to quickly locate traces. From the Browse Traces tab, click the Find button and enter the search criteria. You can search by File Code, part or all of the Account Name, part or all of the contacts's Last Name, range of dates, salesperson and trace type. When searching by Account Name or Last Name, enter only the beginning of the name. This will minimize the chances of entering a misspelled name.

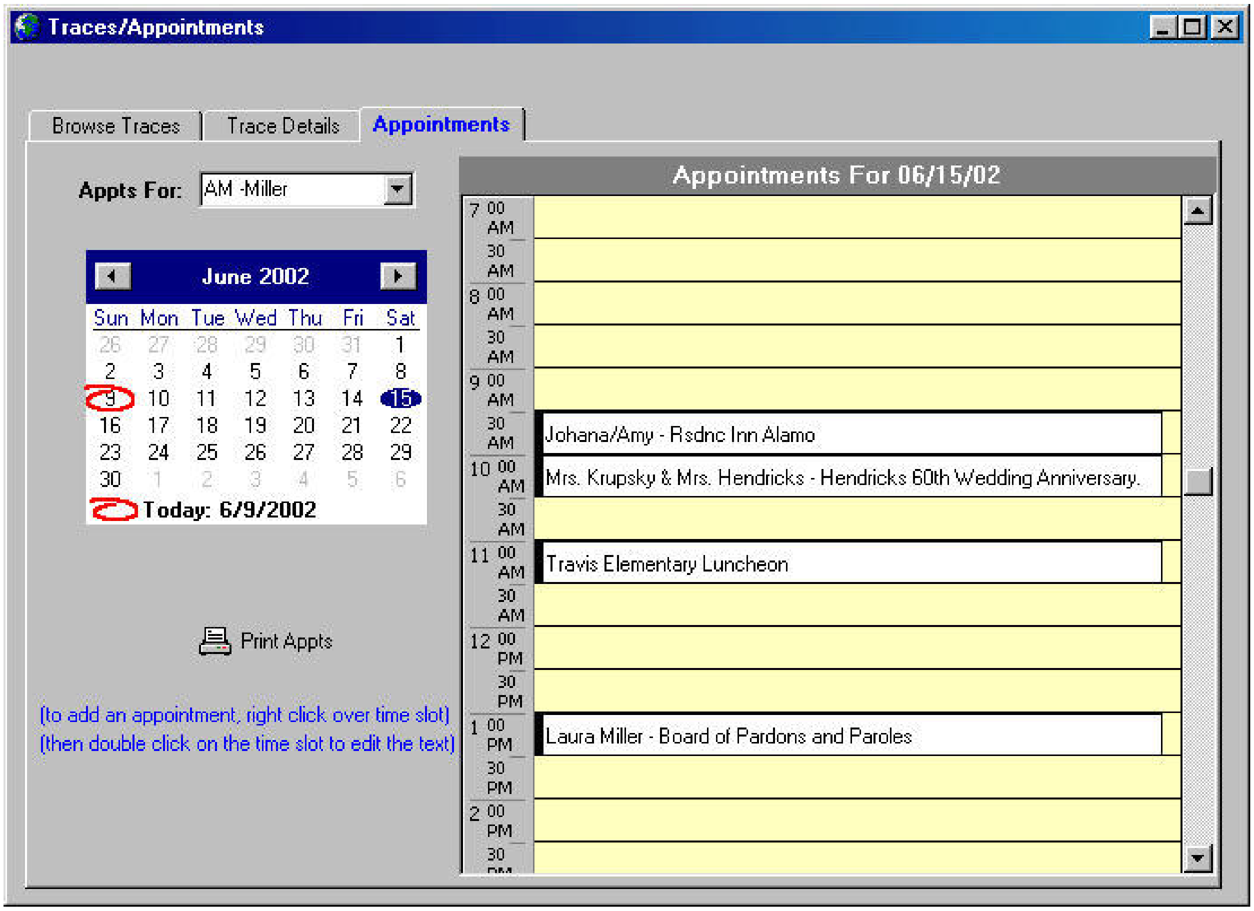
When entering dates, *you will not want to enter a beginning date*. If you enter a beginning and ending date, STS will only show traces that are due during that time period. If you had a trace that was still open from the week before, it will not show. As a general rule, you should only enter the **Ending Date** when filtering. This will tell STS to show the traces open up until the Ending Date you entered. This ties back to the importance of completing (closing) your open traces once they are completed.



PRINT: You can print a trace report by clicking the print button. You will be presented with a Find screen. You have to identify how much information you would like on the report. If you wanted your open traces for the week, you would enter the **Ending Date** and your initials under **Salesperson**. The more information you enter on the Find screen, the more specific the report will be.

APPOINTMENTS

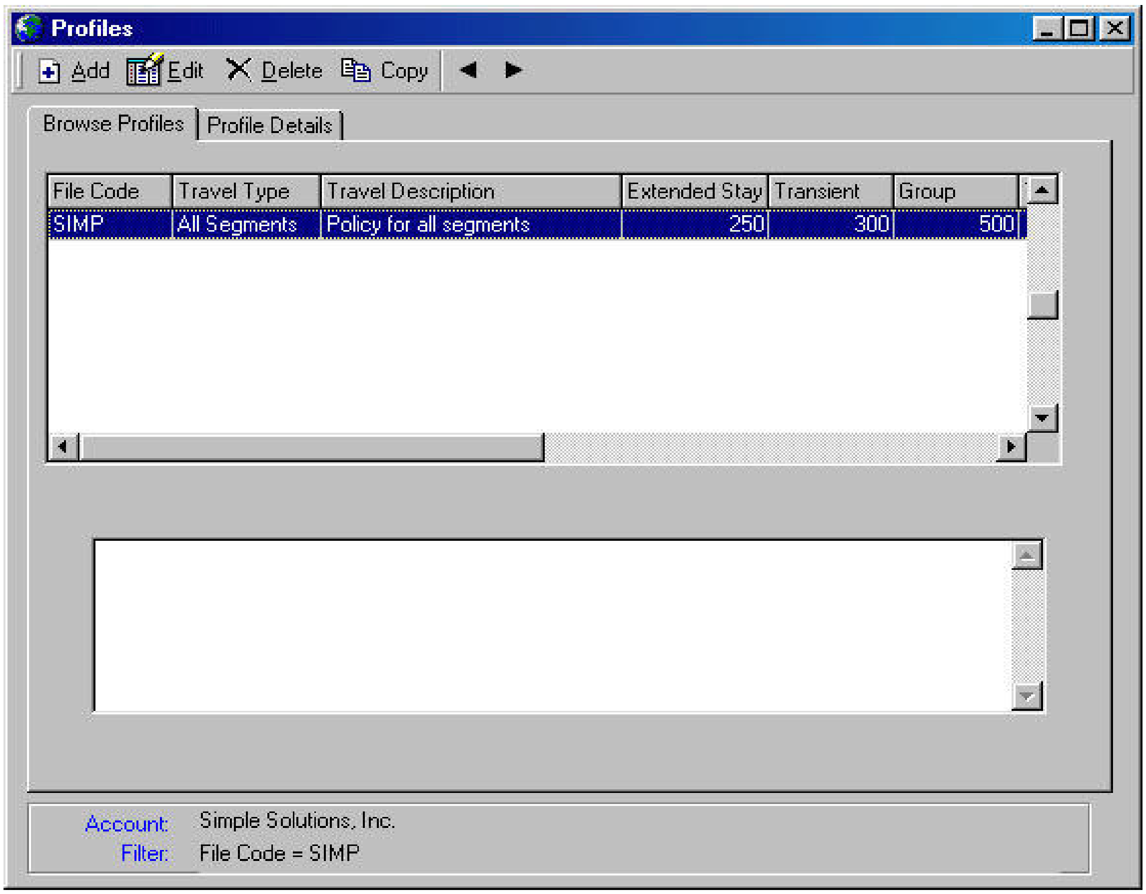
This screen allows you to view your appointment calendar along with any open traces. You may click the down arrow above the calendar to choose different salespersons to view. Clicking on a date in the calendar will display the appointments for that date.



To add an appointment, double click over the time you would like to schedule an appointment for. After the appointment is added you can type in up to 80 characters of text describing the appointment. Once you have added the text, press the Tab key. To increase the time of the appointment, place the mouse pointer over the bottom line of the appointment. A up/down arrow will appear. Hold the left mouse button down and drag the appointment box downward to cover the time of the appointment.

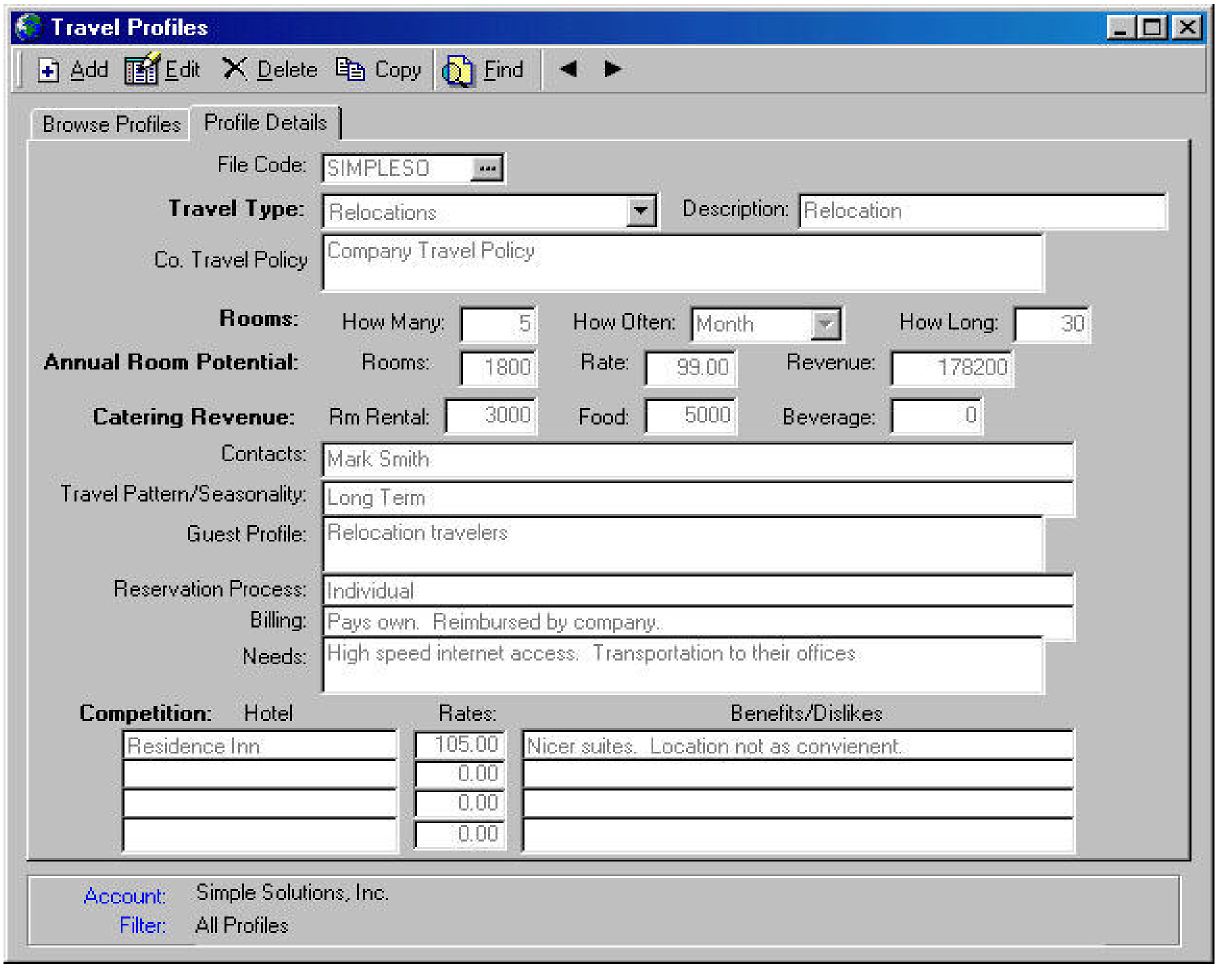
This section of STS is designed to automate the collection of travel profile information for an account. This information would include, among other things, the travel policy, room night potential, travel patterns, billing process. Information can be entered for each market segment if the travel profile data changes by segment. The Travel Profile section could, but would not typically be utilized for all accounts. The Travel Profile section may be attractive for tracking travel profile information for Preferred accounts.

From the main menu bar, click on Accounts, then choose Add/Retrieve. While on the Master Account screen, click on the **Profiles** button, at the top of the screen, to retrieve the Travel Profile options/functions and scrolling profile screen. STS will automatically filter the list of travel profiles to show you only profiles for the account that was on the screen when you clicked the Profiles button. You can change this list easily and find profiles for any account by using the Find button.



<u>ADD PROFILES</u>: When in the scrolling travel profiles screen, click on the **Add** button to add travel profiles for a specific account. You will be presented with the following input screen. To move forward in the cells, use the Tab key. To move backwards, press Shift+Tab. Complete all *applicable* fields. Remember to click "OK" to save input.

TRAVEL PROFILES – ADD *continued*



Fill in the appropriate fields and click the "OK" button to save. Remember you can click the "look-up" button on those fields that are validated to pop up a "look-up" list of valid answers. You can also click on the Profile Notes tab and enter any additional notes about the profile you are adding.

<u>EDIT PROFILES</u>: Highlight the profile you would like to edit on the Browse Travel Profiles screen and click the **Edit** button**.** You may change any data by typing over the previous entries. If edited, click the "OK" button to save changes.

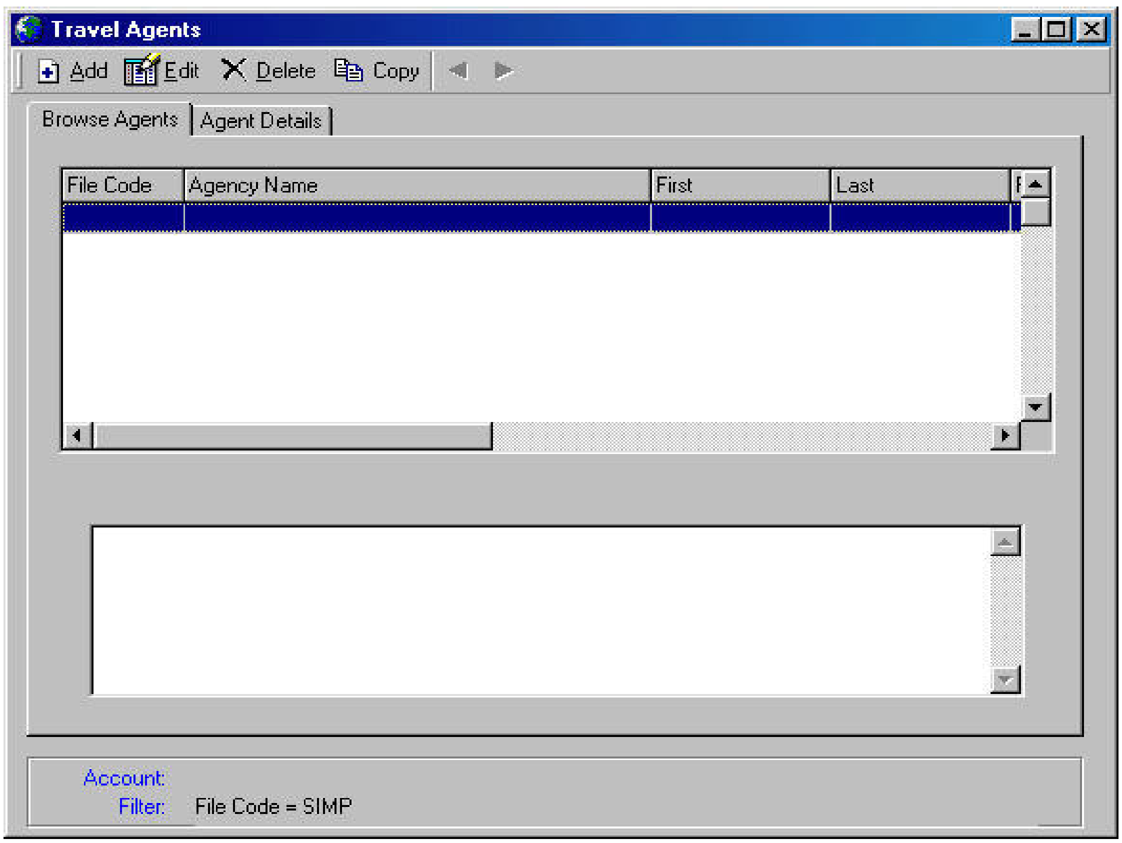
<u>DELETE PROFILES</u>: Highlight the profile you would like to delete on the Browse Travel Profiles screen and click the **Delete** button**.** You will be asked to confirm the deletion.

<u>FIND PROFILES</u>: The Find button allows you to quickly locate a profile for a different account. From the Browse Profiles tab, click the Find button and enter the search criteria. You can search by File Code, part or all of the Account Name, Travel Type or room volume for Extended Stay, Transient and/or Group. When searching by Account Name enter only the beginning of the name. This will minimize the chances of entering a misspelled name.

TRAVEL AGENTS

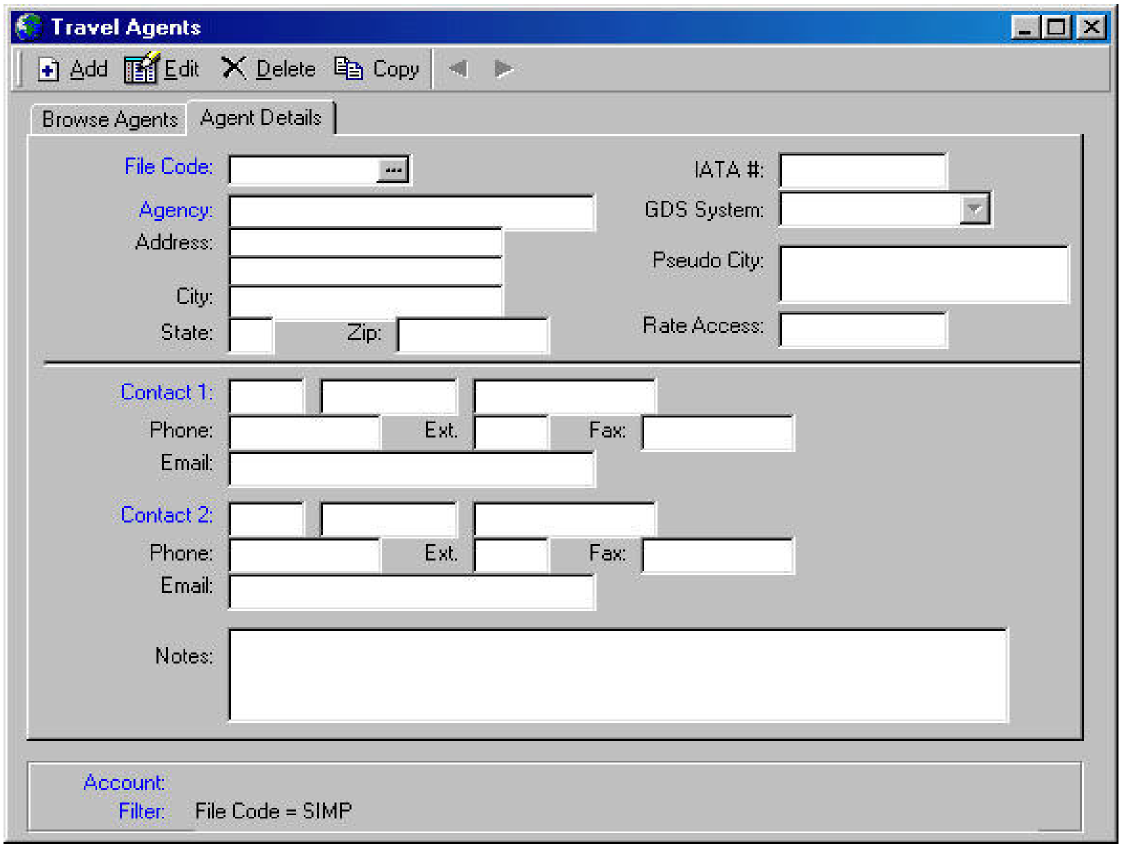
This section of STS is designed to automate the collection of travel agent information for an account, including the agency name, address, contact info, their IATA number, among other things. You can add information for as many agencies that may book for an account.

From the main menu bar, click on Accounts, then choose Add/Retrieve. While on the Master Account screen, click on the **T/A's** button, at the top of the screen, to retrieve the Travel Agents options/functions and scrolling profile screen. STS will automatically filter the list of travel agents to show you only agents for the account that was on the screen when you clicked the T/A button.



<u>ADD AGENTS</u>: When in the scrolling travel agents screen, click on the **Add** button to add travel agents for a specific account. You will be presented with the following input screen (next page). To move forward in the cells, use the Tab key. To move backwards, press Shift+Tab. Complete all *applicable* fields. Remember to click "OK" to save input.

TRAVEL AGENTS – ADD *continued*



Fill in the appropriate fields and click the "OK" button to save. Remember you can click the "look-up" button on those fields that are validated to pop up a "look-up" list of valid answers. You can also enter notes in the notes window pertaining to this travel agent.

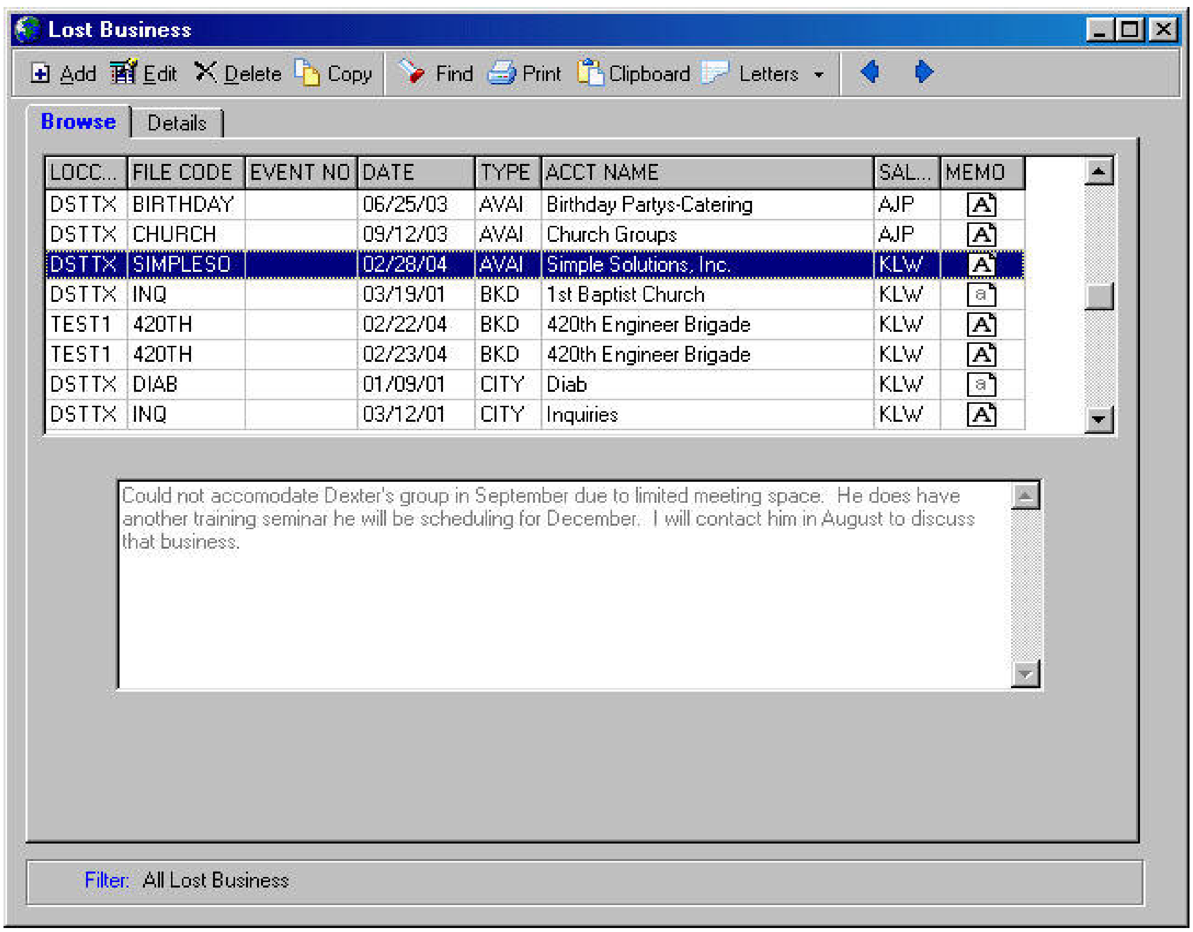
EDIT AGENTS: Highlight the agent you would like to edit on the Browse Travel Agents screen and click the **Edit** button**.** You may change any data by typing over the previous entries. If edited, click the "OK" button to save changes.

DELETE AGENTS: Highlight the agent you would like to delete on the Browse Travel Agents screen and click the **Delete** button**.** You will be asked to confirm the deletion.

LOST BUSINESS

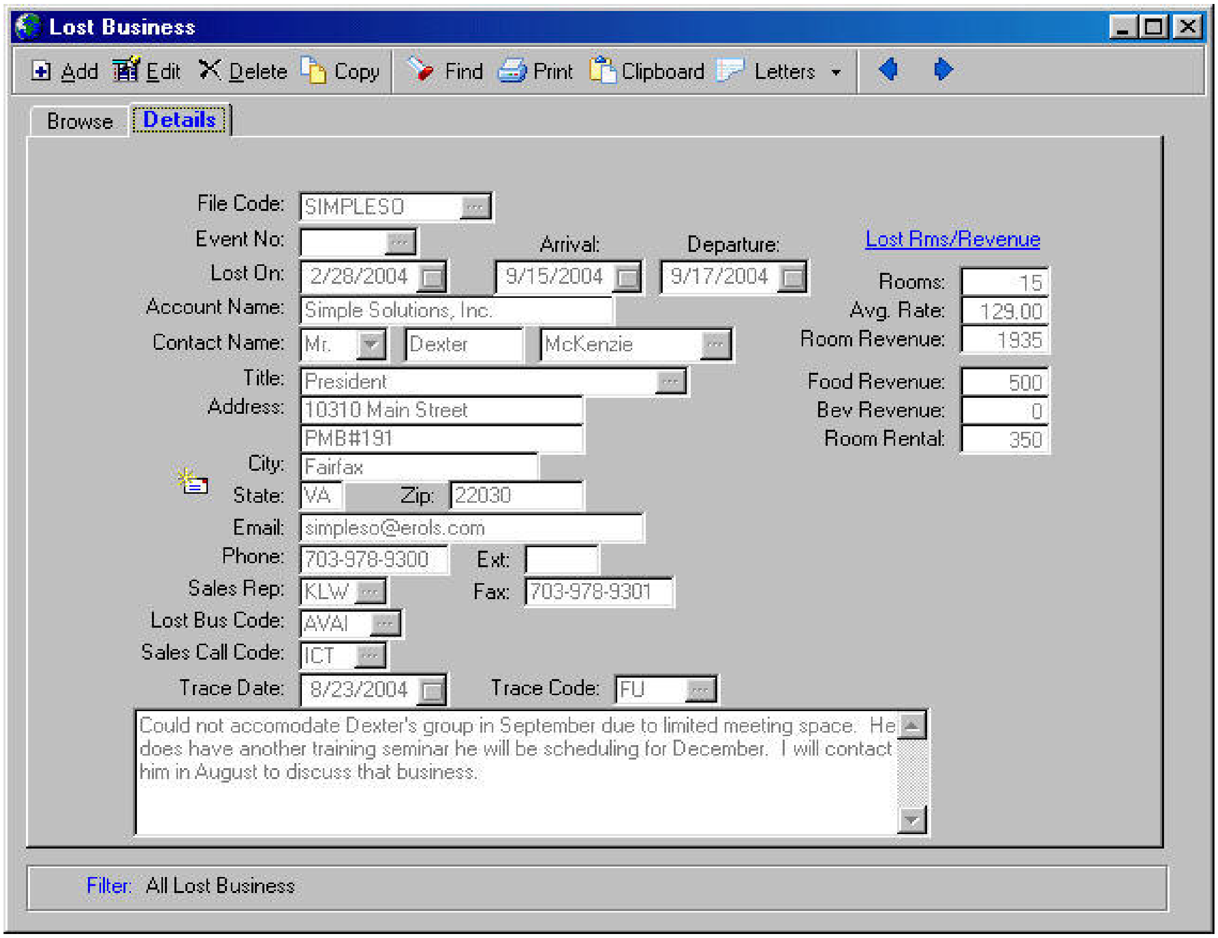
The lost business module allows you to capture and quickly summarize/analyze business which you could not book or business you have sent out a contract for then the group canceled. The lost business module is integrated with the group booking screen. When you cancel a booking the information is automatically transferred to the lost business file. You may also enter lost business information that is not associated with a particular booking. You have the ability to easily trace a piece of lost business for follow up in the future. When utilized regularly, the lost business module can quickly provide you with vital information concerning missed booking opportunities.

From the main menu bar, click on Accounts, then choose Lost Business. A screen similar to the one below will appear. You can change this list easily and find Lost Business entries for any account and/or contact by using the Find button.



ADD LOST BUSINESS: When in the scrolling lost business screen, click on the **Add** button to add lost business transactions. You will be presented with the following input screen. To move forward in the cells, use the Tab key. To move backwards, press Shift+Tab. Complete all *applicable* fields. Remember to click "OK" to save input.

LOST BUSINESS – ADD *continued*



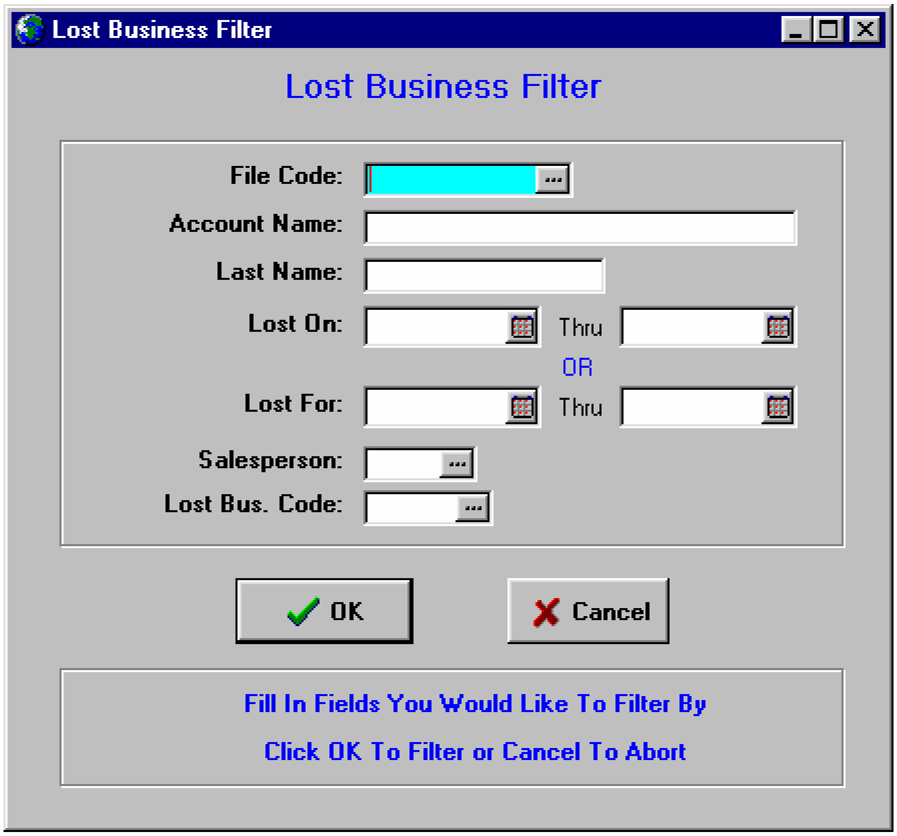
Fill in the appropriate fields and click the "OK" button to save. Remember you can click the "look-up" button on those fields that are validated to pop up a "look-up" list of valid answers. The "look-up" button on date fields pops up a calendar allowing you to "double click" on a date to choose. The notes window at the bottom can hold an unlimited amount of text for each lost business entry.

An important feature is the ability to automatically generate a **sales call** and a **trace** from the lost business screen. STS will automatically attach the notes from the lost business entry to your sales call and future trace. This allows you to easily follow up with a group for possible future business as the notes from the last conversation will be attached to the trace.

EDIT LOST BUSINESS: Highlight the entry you would like to edit on the Browse Lost Business screen and click the **Edit** button**.** You may change any data by typing over the previous entries. If edited, click the "OK" button to save changes.

DELETE LOST BUSINESS: Highlight the lost business entry you would like to delete on the Browse screen and click the **Delete** button**.** You will be asked to confirm the deletion.

FIND LOST BUSINESS: The Find button allows you to quickly locate a lost business entry. From the Browse tab, click the Find button and enter the search criteria. You can search by File Code, part or all of the Account Name, part or all of the contact's Last Name, range of dates, salesperson and lost business type code. When searching by Account Name or Last Name, enter only the beginning of the name. This will minimize the chances of entering a misspelled name.



CLIPBOARD: You can copy contact name/address information from the Lost Business Screen to a document in Word. Locate and highlight the contact you would like to copy. Click the Clipboard button. Once in Word, click your right mouse button and choose "Paste" with the left mouse button. The info will be pasted into your Word document in the format as if you were beginning a letter to the contact. This can be very helpful in quickly generating a follow up letter. It is recommended you create some boiler plate letters and save them without the address block at the top of the letter. You can then open one of these letters and paste a contact's name and address which you copied to the clipboard from the lost business screen.

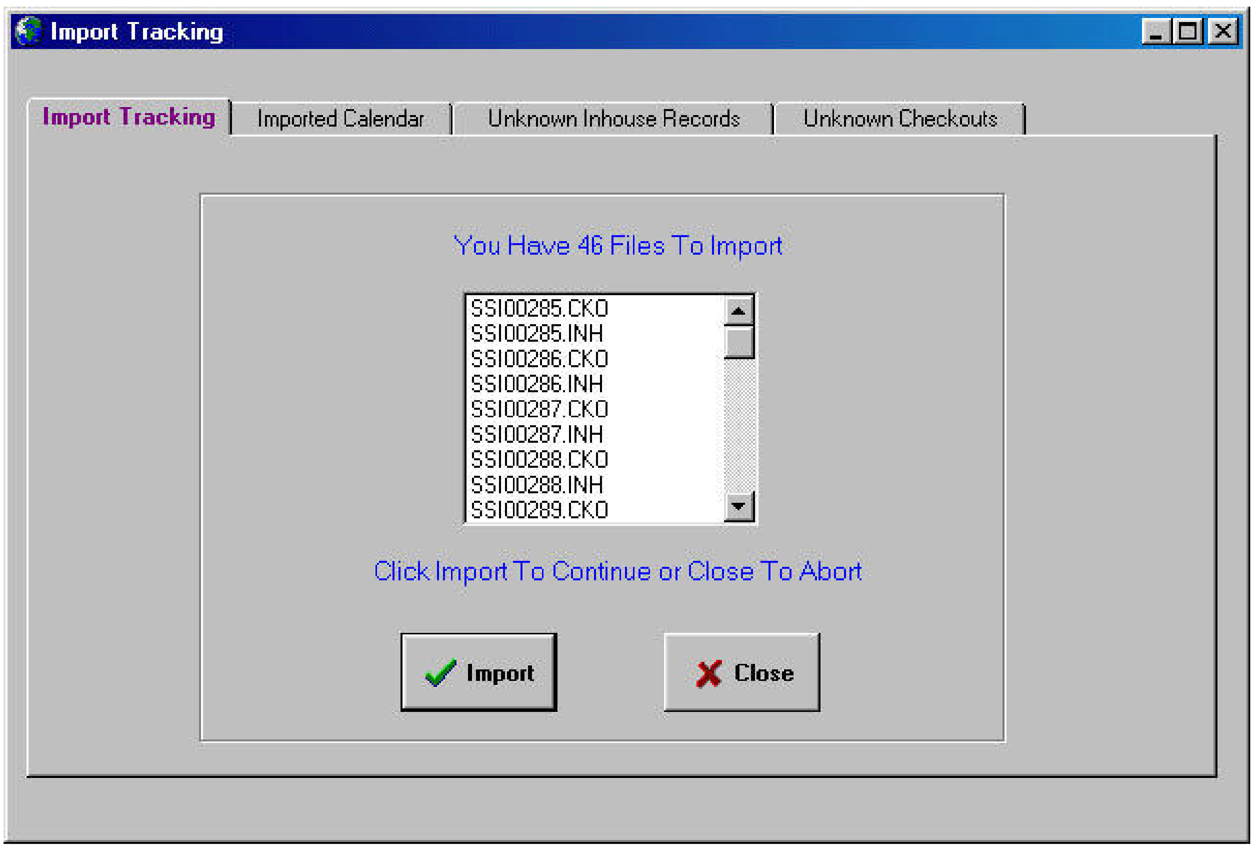
PRINT: You can print a lost business report by clicking the print button. You will be presented with a Find screen. You have to identify how much information you would like on the report. The more information you enter on the Find screen the more specific the report will be.

Once you have added accounts to STS you may track their activity one of two ways: By importing their activity from the MSI property management system and/or manually posting their activity. The key field for tracking is the CORP NO field on the account screen. This code identifies the account and will be used during the import process from MSI. The CORP NO will also be required if manually posting tracking information in STS. You should import your tracking on a weekly basis.

Currently the import function only works with the property management system from MSI.

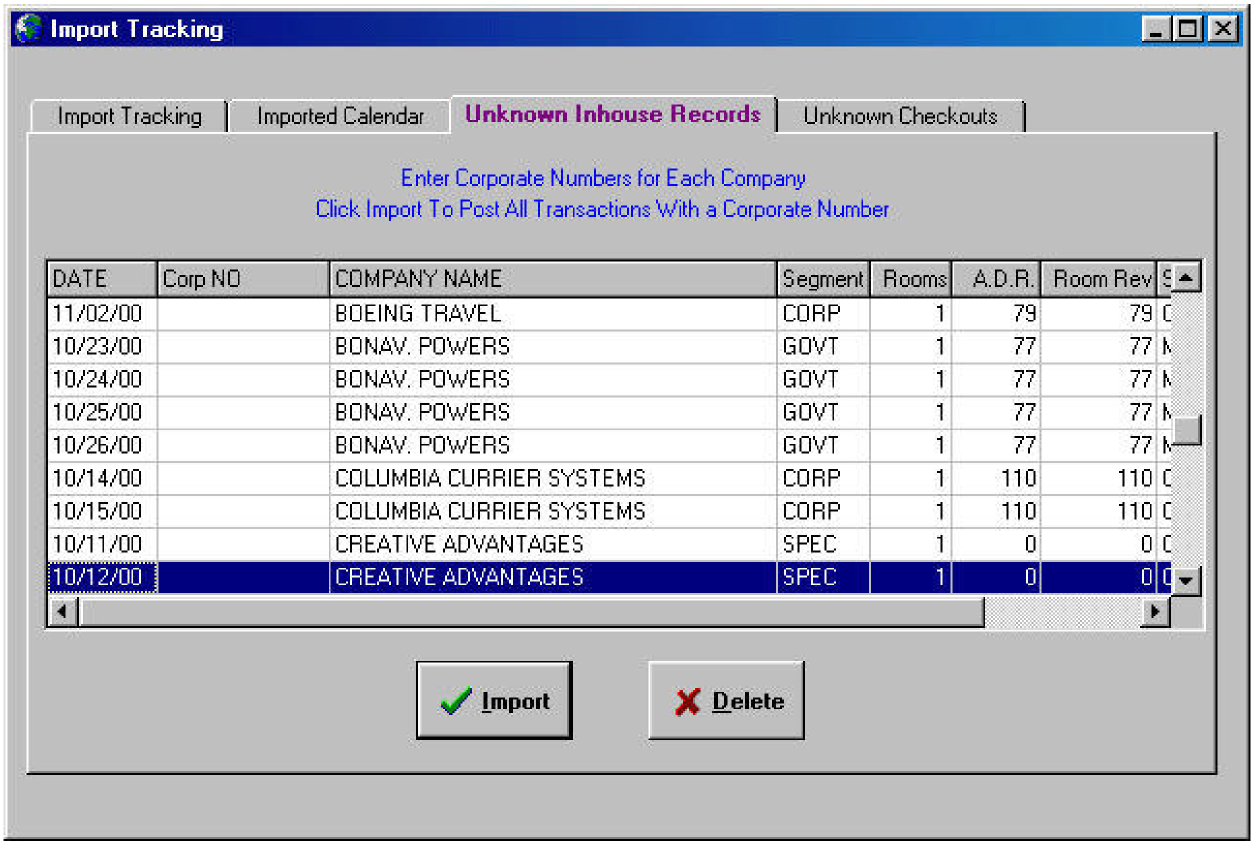
Import Tracking

Once you click on the Daily Tracking option from the main menu bar, you will be presented with the following menu: **Import Tracking and Add/Edit Tracking.** Click on Import Tracking.



The Import Tracking Screen appears. This initial screen directs you to insert your Data Disk into drive A and click the OK button. The files on the diskette will be displayed in the window. Files that end with INH are inhouse files. Files that end in CKO are checkout files. The number in the file name is the number of days since January 1st. MSI assigns the names to the files. Click the Import button to begin the import process. During the import process STS checks each inhouse record for a corporate number. If one is found it is checked against the corporate number field on each account in STS. If a match is found, that transaction is posted. If a match is not found STS then checks for a company name and tries to match that against the company name field on the account screen.

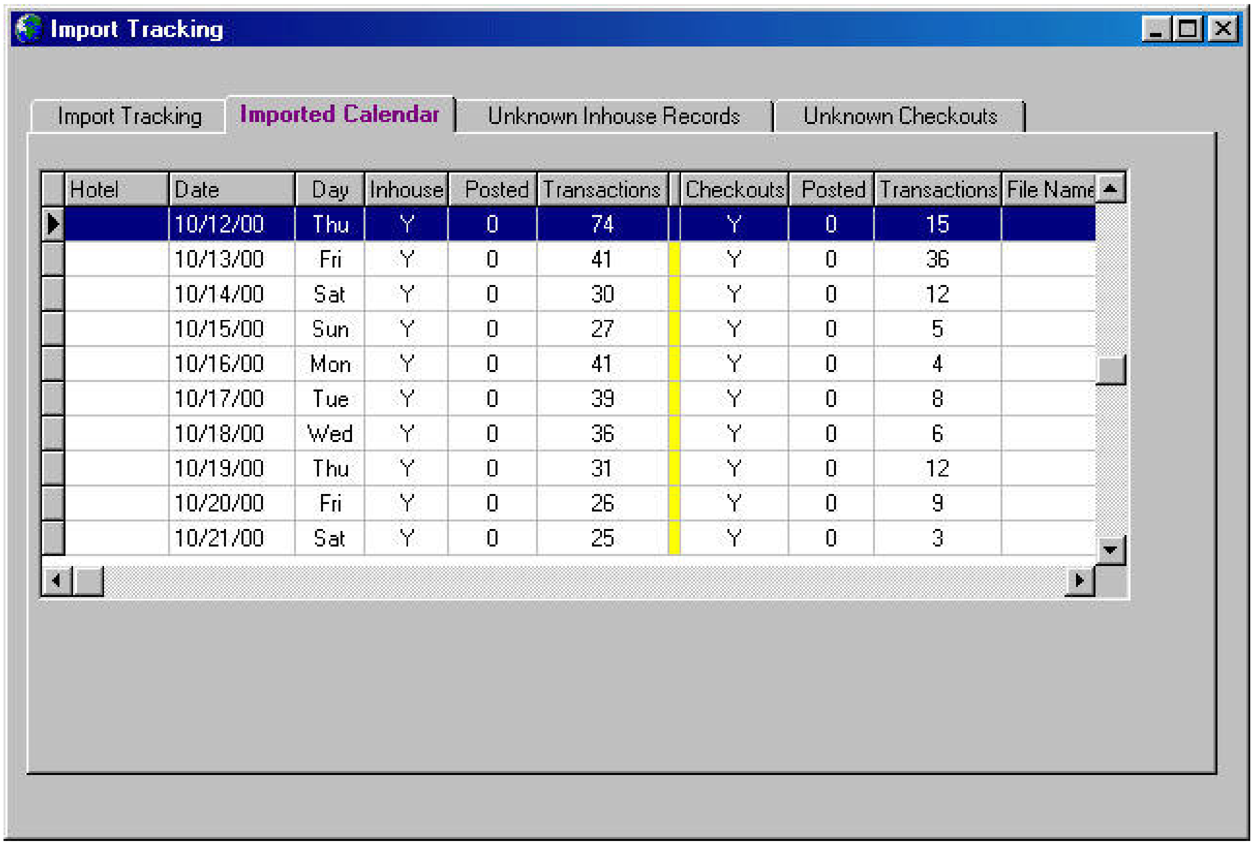
Import Tracking (continued)



When a match cannot be found, with the corporate number or company name, the inhouse transaction is saved to the Unknown Inhouse Records file. **You should review this file on a regular basis and either enter a valid corporate number or valid company name**. When you click in the Corp No cell, you can either type in a valid corporate number or, click the lookup button to see a list of all of your accounts. You can also edit the company name to match the way you have it setup on your account screen. **Modifications made to this screen should be communicated to the front desk so they can modify the guests' inhouse record**. If the inhouse record is not corrected in MSI, you will have to correct it on this screen every time you import. Once you have corrected some or all of the transactions, you can then click the Import button. STS will look at each of the unknown transactions and post the ones it can find a match for.

Since all inhouse records are included in the import file, you will need to delete some transactions that either should not or could not be posted due to erroneous information. Highlight the transaction and click the delete button. You can also highlight a transaction, hold down the shift key and tap the down arrow key, or hold down the shift key and click your left mouse button, to highlight multiple transactions. When you click the Delete button those transactions highlighted will be deleted.

Import Tracking (continued)



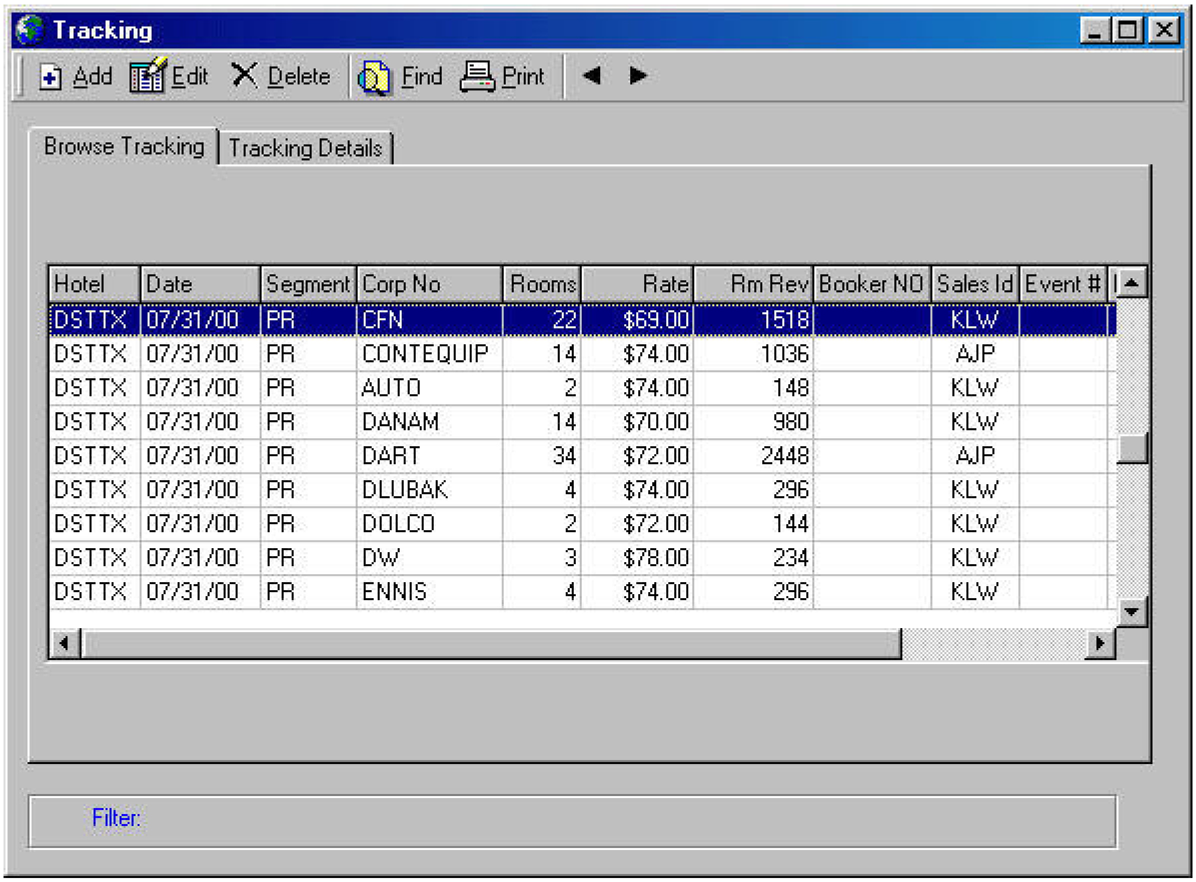
Hotel	Date	Day	Inhouse	Posted	Transactions	Checkouts	Posted	Transactions	File Name
	10/12/00	Thu	Y	0	74	Y	0	15	
	10/13/00	Fri	Y	0	41	Y	0	36	
	10/14/00	Sat	Y	0	30	Y	0	12	
	10/15/00	Sun	Y	0	27	Y	0	5	
	10/16/00	Mon	Y	0	41	Y	0	4	
	10/17/00	Tue	Y	0	39	Y	0	8	
	10/18/00	Wed	Y	0	36	Y	0	6	
	10/19/00	Thu	Y	0	31	Y	0	12	
	10/20/00	Fri	Y	0	26	Y	0	9	
	10/21/00	Sat	Y	0	25	Y	0	3	

The Imported Calendar screen allows you to review dates to determine for which days you have imported tracking. It also shows you the total transactions exported from MSI (Transactions) and how many of those transactions were posted to accounts in STS (Posted). There is also a Y in the Inhouse column if you have imported tracking for that date. STS will not allow you to accidentally import the same day twice.

Add/Edit Tracking

The Add/Edit Tracking option allows you to add, edit or view previously entered tracking. This includes transactions that may have been imported. You must enter tracking information to generate many of the reports under the Account section (Main Menu | Reports | Accounts).

Once you click on the Daily Tracking option from the main menu bar, you will be presented with the following menu: **Import Tracking and Add/Edit Tracking.** Click on Add/Edit Tracking.



Hotel	Date	Segment	Corp No	Rooms	Rate	Rm Rev	Booker NO	Sales Id	Event #
DSTTX	07/31/00	PR	CFN	22	$69.00	1518		KLW	
DSTTX	07/31/00	PR	CONTEQUIP	14	$74.00	1036		AJP	
DSTTX	07/31/00	PR	AUTO	2	$74.00	148		KLW	
DSTTX	07/31/00	PR	DANAM	14	$70.00	980		KLW	
DSTTX	07/31/00	PR	DART	34	$72.00	2448		AJP	
DSTTX	07/31/00	PR	DLUBAK	4	$74.00	296		KLW	
DSTTX	07/31/00	PR	DOLCO	2	$72.00	144		KLW	
DSTTX	07/31/00	PR	DW	3	$78.00	234		KLW	
DSTTX	07/31/00	PR	ENNIS	4	$74.00	296		KLW	

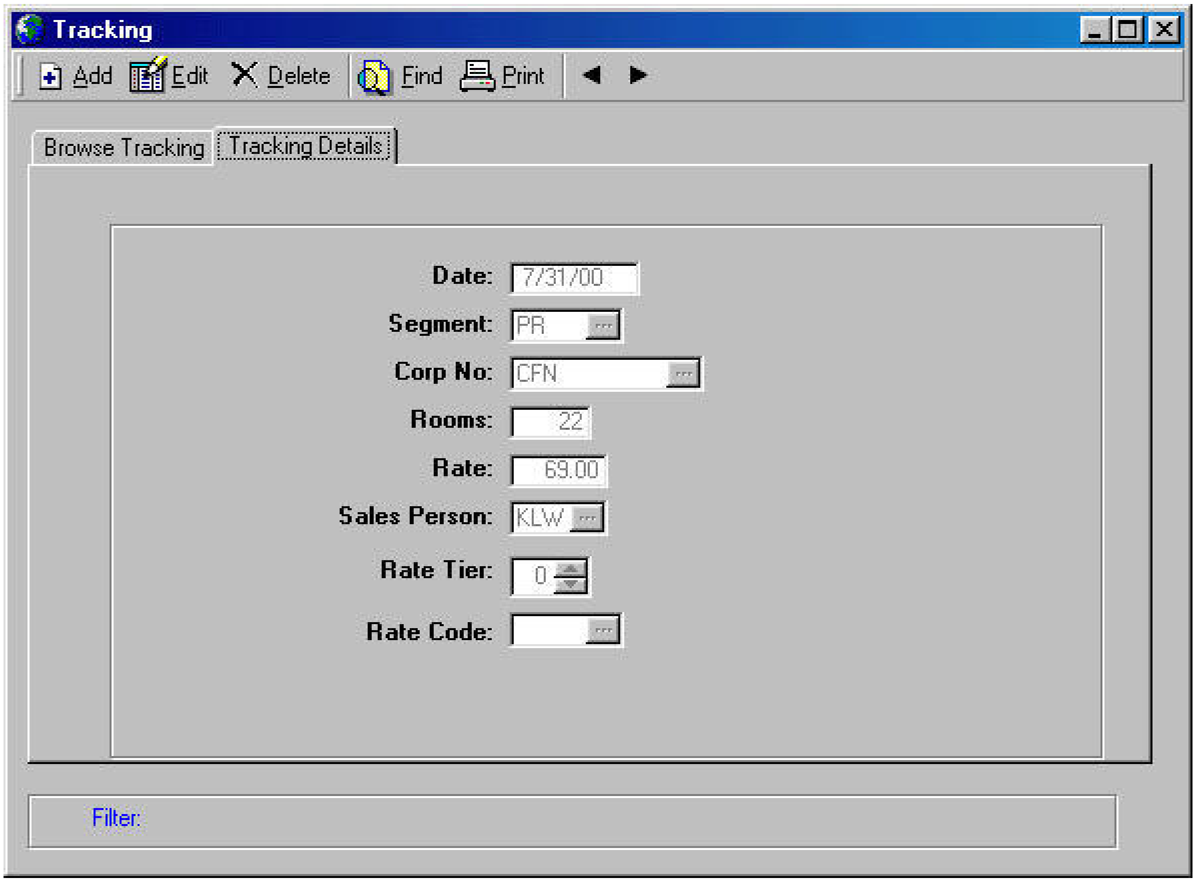
From this screen you can utilize the Add, Edit, Delete, Find or Print options.

The Add, Edit and Delete buttons allow you to add, modify or delete transactions added from this screen or through the Import process from MSI.

The Find button allows you to filter transactions by Corp NO and dates. This is helpful if you are looking for transactions posted for a certain company or during a certain period of time.

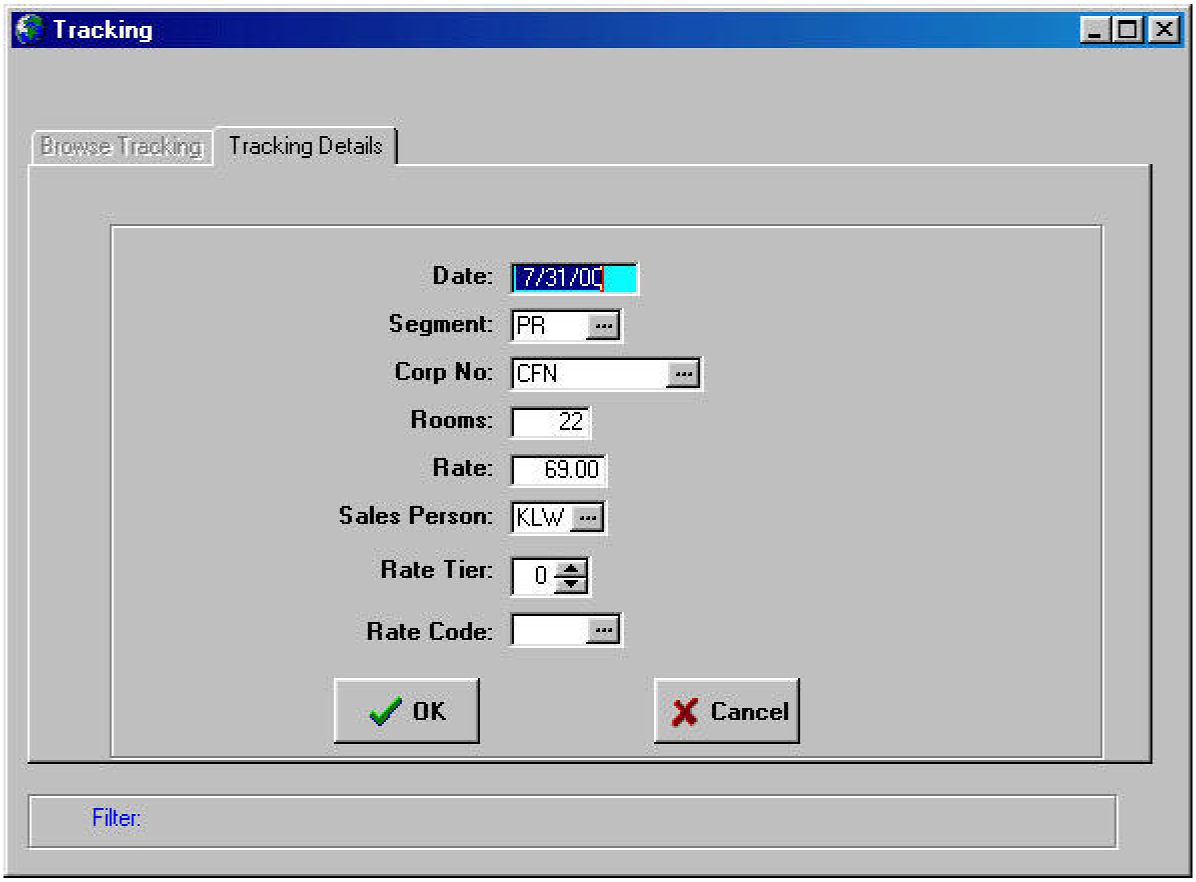
Changes made to the transactions above will be reflected in the YTD statistics on the Account screen.

The screen below illustrates the Add/Edit screen.



You can view the details of a transaction by clicking the Tracking Details Tab.

After clicking the Add or Edit button you will see the detail screen. Enter/modify the transaction and click the OK button to save the changes or Cancel to abort. You can click the buttons to the right of the Segment or Corp NO fields for look-up.

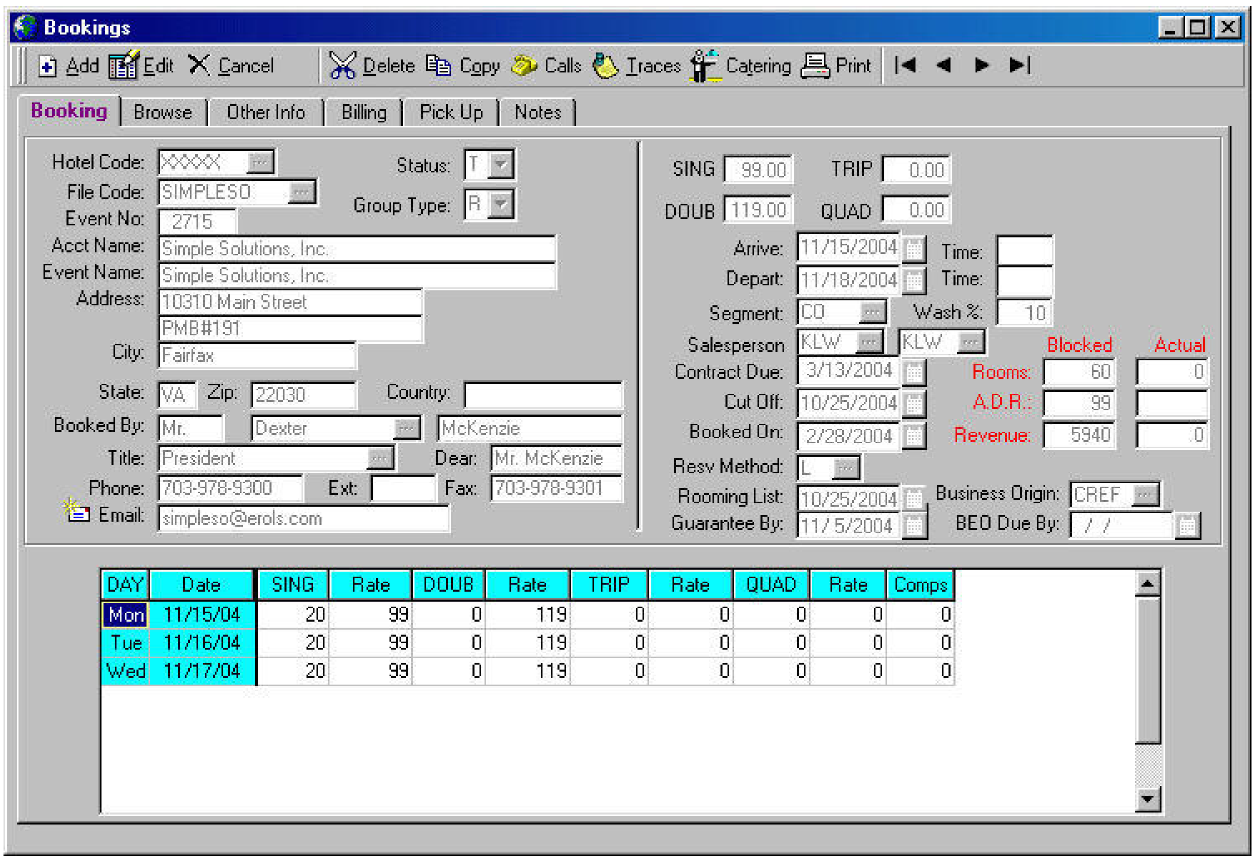


The Rate Tier field is optional. It allows extended stay hotels to track what tier the rate paid falls into.

The Rate Code field is also optional. It adds another way to track the type of rate charged a client. This could include pre-opening rates, holiday rates or special marketing rates. You need to add the rate codes under Utilities | Table Maintenance | Rate Codes before you can enter codes in the field.

This section will allow you to enter *group rooms business*. Although most of the other tracking features of the program record "history", this section will record "future business" then also the group's "rooms pick-up". The Group Booking screen is also used catering only functions. Some systems have a separate booking screens for rooms and catering. In STS you always start with this booking screen regardless if the group is rooms only, catering only or rooms and catering.

Once you click on Bookings from the main menu bar, choose **Add/Retrieve.**



Booking - Field Overview

When the Add/Retrieve option is chosen, the user is presented with a screen containing a completed booking record, if any records have been added. To add a new booking, simply click on the **ADD** button (top left of screen) and you will be presented with a blank Booking input screen. Following is a description of the individual input fields:

(Note: The Booking tab (bottom left of screen) is highlighted to indicate that you are working within this area.)

Booking - Field Overview

Hotel Code**:** The hotel code will default to whatever code was entered under Utilities / Configure Hotel Info. If this field was not changed, XXXXX will appear. You should leave the default.

File Code**:** Enter **file code** for the account for which you will add the booking. Click on account/file code then click on "OK" to retrieve to screen.

Status: Please enter **D**efinite, **T**entative or **P**rospect (rooms will not be deducted from allocation for the "prospect" status).

Group Type: Please enter **R** for Rooms, **C** for Catering or **B** for Both (rooms and catering).

Event Number: Once the booking is saved, an event number will automatically be assigned to it.

New/Repeat: Is this the first time the account has booked group business with you? Enter **N** for New or **R** for Repeat.

Account Name/Book Name/Address: If this information was input when the account was originally added to the system, it will be retrieved to the screen. You may type over any fields to modify the information. (Note: The account name will be retrieved into the book name field. The book name may be changed, e.g. account name = IBM, but the book name = IBM Regional Meeting.)

Booked By/First/Last/Title/Dear/Phone/Fax: Complete these fields for the person who booked this piece of group business. Click the "look-up" button for a list of contacts on file for this account.

Sing/Dbl/Trip/Quad: Enter the rates applicable for "Single", "Double", "Triple" and "Quad" occupancy. These "labels" may be changed/customized under Utilities/Loc Info. *Ensure rates are added **before** you enter arrival/departure dates.*

Arrive/Depart Dates: *Ensure the previous rate fields have been completed as applicable, then enter the arrival and departure dates of the group.* To the right of the date, you may also enter a time (e.g. the hour a bus tour is scheduled to arrive/depart).

Segment: The segment code will be automatically retrieved from the account screen. You may modify it for this group booking if necessary.

Wash: The system is requesting a "wash factor" percentage (blind cut). Example: The Jones' wedding party reserves 100 group rooms. You expect that only 50 will be picked up. The wash factor would be 50%. Wash is what percentage **will not** show up.

Salesperson: The salesperson's code will be automatically retrieved from the account screen. You may modify it for this group booking if necessary. *The 2nd sales person field is for the person who will be taken care of the catering details if applicable.*

Contract Due (Date): Enter the date when the signed contract must be returned.

Booking - Field Overview

Cut Off (Date): Enter the date when the room block will be released.

Booked On (Date): The date will automatically default to today's date (in the system). You may type over the field with an alternate date if applicable.

Resv Method: Enter a code specifying how the group will make their reservations. I for individual, L for rooming list. You may click the look-up button to see a list of valid codes.

Rooming List (Date): Enter the date the rooming list is due back, if the group will be making their reservations via a rooming list. Leave the field blank if they are not using a code specifying how the group will make their reservations. I for individual, L for rooming list. You may click the "look-up" button to see a list of valid codes.

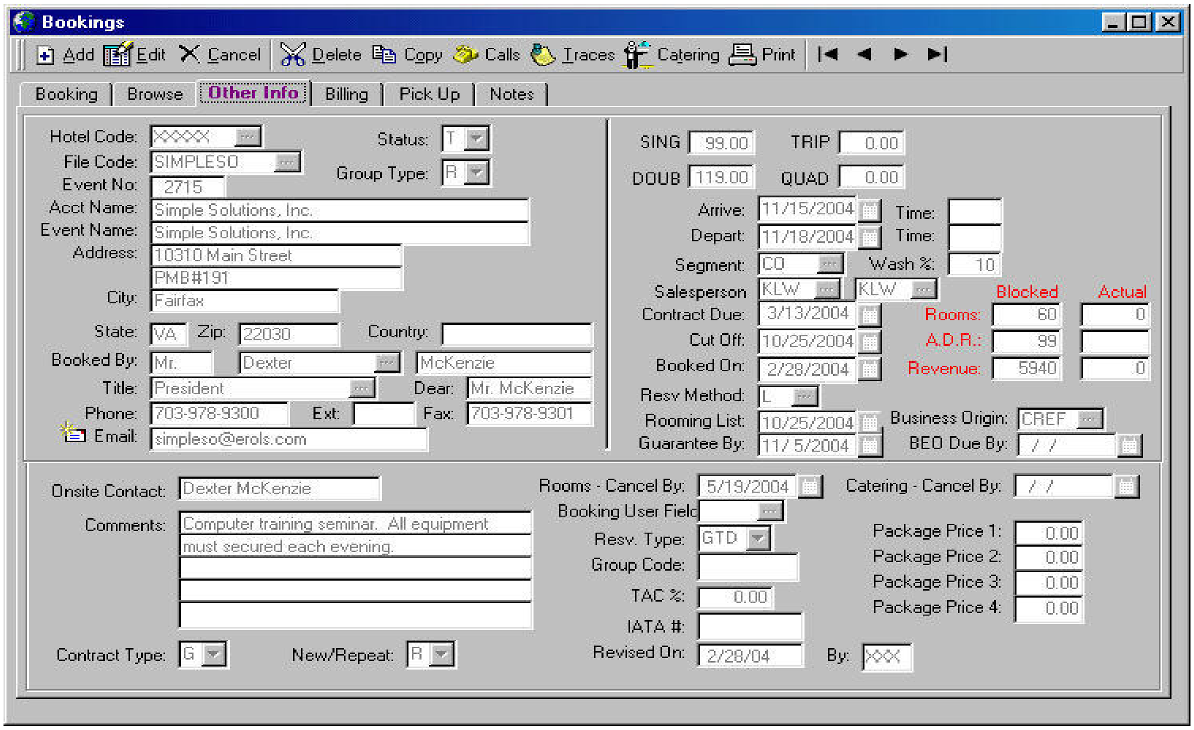
Rooms Grid: Once you add rates and arrival and departure dates in the aforementioned fields, the grid will be filled out with this data. You may now enter the total group rooms reserved for each date and category (including "comp" rooms). Click on the blank fields and use the Enter key and the left/right arrow keys to move around the grid.

The Rooms, A.D.R., and Revenue fields, on the right side of the booking screen, are totals for this booking. These fields are calculated fields and will be filled in once you save the booking. You cannot modify these fields directly.

During the Add Booking process the Decision Date (contract due), Cut-Off Date, Rooming List Date, Cancel By Date and Guarantee By Date fields can be automatically filled in via a formula. To add these formulas, click Utilities | Configure Hotel Info | Program Config tab.

When all applicable fields have been completed on the ADD BOOKING screen, click on "OK" (top right of screen) to save new booking information. Prior to saving, you may also add information under the tabs ("other info", "billing" or "notes") located on the bottom left of screen. **(This information may also be added at a later date by retrieving the booking then "editing" the appropriate section.)**

BOOKINGS - OTHER INFORMATION TAB: When adding a new booking, you may click on the **Other Info** tab (bottom left of screen) to access this window. This information will be needed if you will use the *automated contract/document merging features* of STS.



Several of the fields under the other information section contain "prompts". While in the "add" or "edit" mode, position the mouse cursor over the field to access these prompts when available.

Onsite Contact: If known, type in the contact that will be onsite with the group.

Comments: *IMPORTANT*…These are comments that you want others to see, e.g. the tour director's room is "comp", group needs transportation, etc. These comments will appear on certain system reports. On the other hand, the "Notes" section should be used for personal notes on the group.

Contract Type: G for Group or E for Extended Stay.

New/Repeat: N or R. Is this a New or Repeat piece of business.

Cancel By: Enter the date by which the group could be cancelled without penalty.

Business Origin: Where did the business come from? You must set up the database (e.g. central reservations, cold call, etc.) of codes under Utilities/Table Maintenance/Origin Codes.

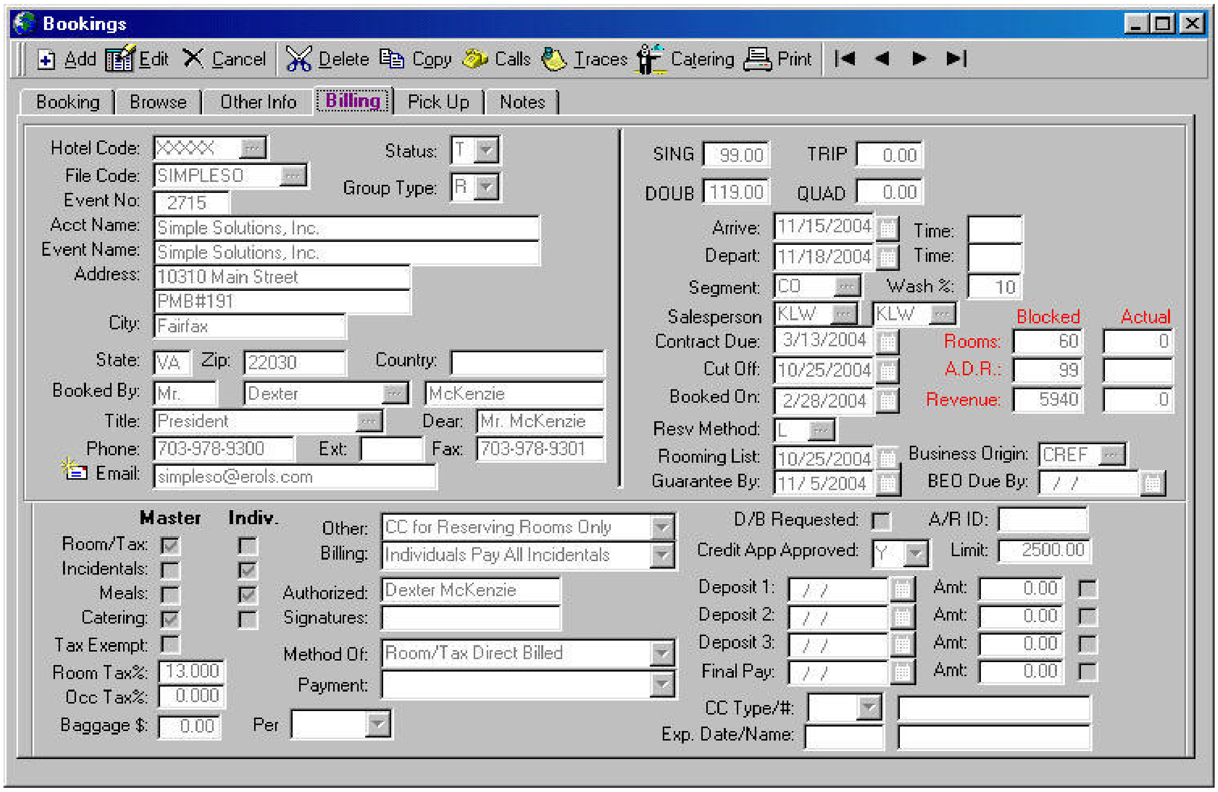
Resv Type: The system will default to guaranteed.

Group Code: Enter this code which will come directly from your reservation system. This code would typically be created after reservations creates the room block in the reservation system.

IATA #: Enter the travel agents IATA number if this group reservation was made by a travel agent and you will be paying a commission.

Revised On/By: When a booking is modified, the date that it is edited will automatically appear in this field in addition to the salesperson "id" code.

<u>BOOKINGS – BILLING TAB</u>: When adding or editing a booking, you may click on the **Billing** tab (bottom left of screen) to access this window. This information will be needed if you will use the *automated contract/document features* of STS. You only need to fill in the information that is pertinent to the group you are entering. Minimally, you should check the Room/Tax, Incidentals, Meals and Catering boxes to indicate how the group will be paying. Also typing the method of payment in the appropriate fields would be helpful.



<u>Room & Tax, Incidentals, Meals, Catering (Master/Individual)</u>: Will room & tax, incidentals and meals be charged to the master group account or an individual folio? Check the appropriate box indicating how the group will pay for each item as applicable.

<u>Tax Exempt Status</u>: Check if the group is tax exempt.

<u>Room Tax/Occupancy Tax</u>: Enter the **percentage** that will be charged for room and occupancy tax, e.g. 4.5 for 4.5% or 10.0 for 10%.

<u>Baggage</u>: Enter the **dollar amount** that will be charged, PER for person or BAG for Bag e.g. $1.00 per Bag.

<u>Other Billing</u>: Enter any relevant billing comments such as "Meeting Room Only Is Direct Billed". You can add common responses to the drop down list from the Table Maintenance screen (Utilities | Table Maintenance | Other Billing Comments).

<u>Authorized Signature(s)</u>: If the group is direct billed, who is authorized to sign the bill.

<u>Method of Payment</u>: You must enter the method(s) of payment which will be used by the group, e.g. Individual Pay, Direct Bill, Credit Card.

BOOKINGS – BILLING TAB

Direct Billing Requested: Check if the group is requesting direct billing.

A/R ID: A direct billing "id" assigned to this group by accounting.

Credit Approved: Check if the group has an approved credit application on file.

Limit: How much credit (in dollars) has been established?

Deposits Due 1 & 2 & 3: Enter the applicable dates and amounts for advance deposit(s).

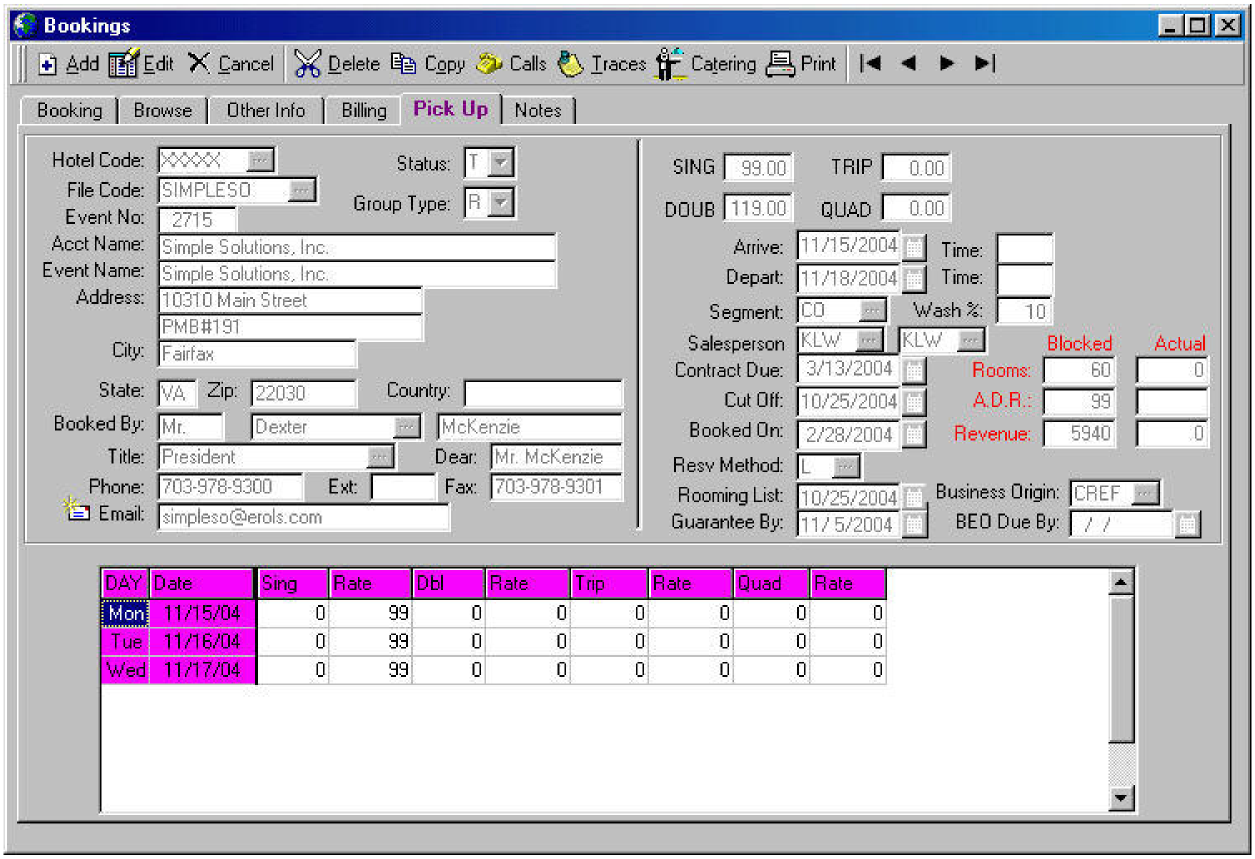
Credit Card Type/Number #: Enter credit card type/number if client will use this method of payment.

Expiration Date: Enter the expiration date on the credit card, if applicable.

Name on Card: Enter the name on the credit card, if applicable.

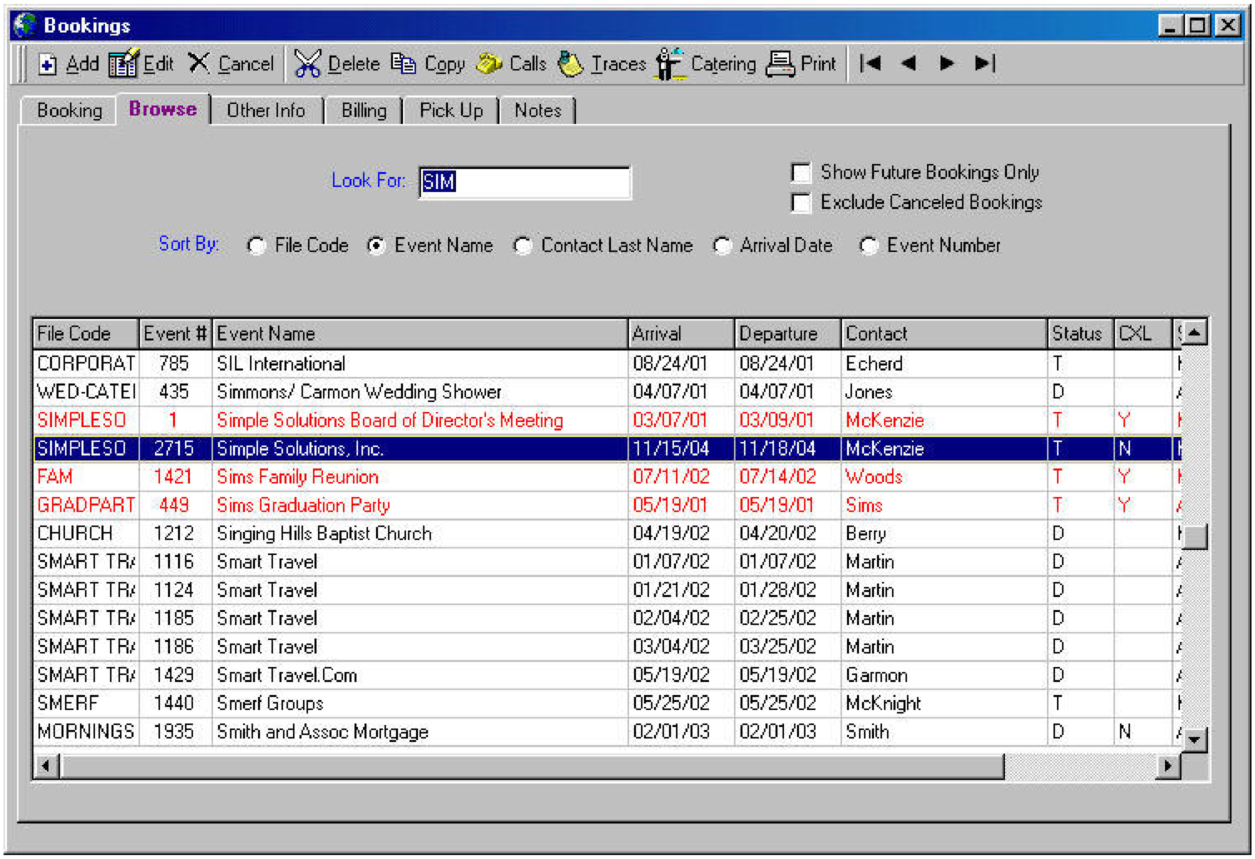
You may click on "OK" at this point or click back on the "Bookings" tab (bottom left of screen) then save the entire booking.

BOOKINGS - PICK-UP TAB: Once a booking has already been added for a group that has stayed with you, it is recommended that you update the pick-up information to have an accurate history of the group. First, retrieve the booking that should be updated by using browse (bottom left of screen). Next, click on the "pick-up" tab on the bottom left of screen to access the pick-up window. Click on **Edit**. Now, you may click within the room grid to update the information. Remember to click on "OK" to save the new information. Click on the "booking" tab (bottom left of screen) to return to the main booking screen.



NOTES: When adding/editing a booking, you may click on **Notes** (bottom left of screen) to access a notes window. The Notes tab (bottom left of screen) is darkened to indicate that you are now working within this area. Simply type in your *personal* notes for this booking, then click back on the Booking tab (bottom left of screen) to save notes and return back to the Add Booking screen. IMPORTANT…If you would like comments to appear on system reports, enter the comments, e.g. the tour director eats free, under the Bookings/"Other Info" tab.

BROWSE: (Bottom left of Booking screen.) This option will be useful when you have numerous bookings in your system. While on the Booking screen, click on the Browse tab in the bottom left corner. You may now browse through the scrolling list of bookings to retrieve a specific booking.



You search for a booking by clicking on one of the buttons at the top of the window. To search by Event Name, click on the Event Name button. Start typing the name of the Booking you are looking for. The program will quickly find matches for the letters you have typed. The browse option is generally the fastest way to retrieve a booking. Within the browse screen, you may also click on the elevator bar arrows (right center of screen) to move the list up or down. You may also move through the list by *dragging* the elevator button on the right. Canceled bookings will display in Red.

You may also only show future bookings by clicking the Show Future Bookings Only box. Unchecking the box will display all bookings.

Once you locate the booking within the browse window, simply double click on the event name or click on the Booking Tab button (bottom left of screen) to return you to the Booking screen. You will notice that the booking you have selected is now retrieved to the screen.

VCR buttons: (Four arrow buttons on top right of Booking screen.) While on the Booking screen, you may click on left arrow VCR buttons to go to the *previous* booking record or to the *first* booking record. By clicking on the right VCR buttons, you can move to the *next* booking record or the *last* booking record available. These would be useful if there are a *limited* number of accounts in the system.

Add Booking Recap (under Bookings-Add/Retrieve)

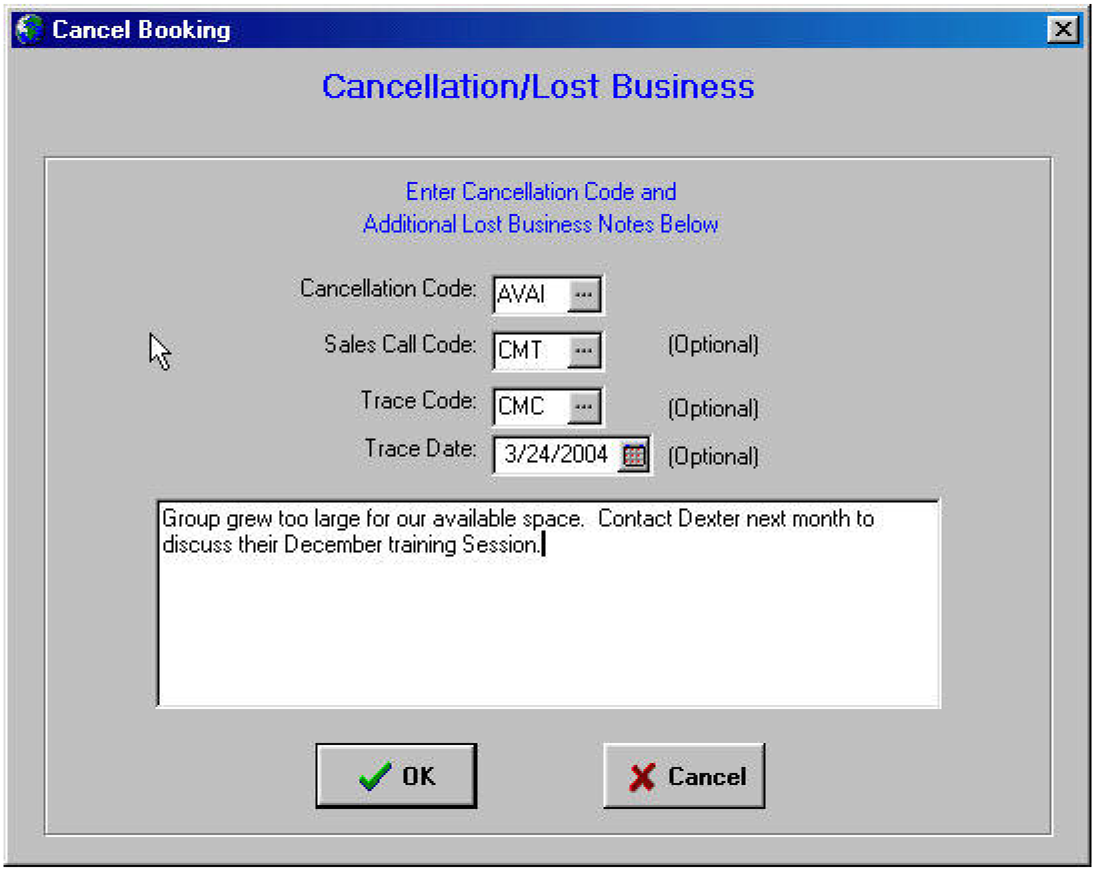
When the Add/Retrieve option is chosen, the user is presented with a screen containing a completed booking record, if any have been added. To add a new booking, click on the ADD button (top left of screen) and you will be presented with a blank input screen. To recap:

1. Go to the Booking (Add-Retrieve) screen and click on Add.
2. Fill in all pertinent information. Once you enter rates (FIRST) then arrival and departure date information, the room grid will display lines for each day the group is in house.
3. Click on the cell in the room grid for which you would like to enter rooms. Use the arrow keys and/or the mouse to position the outline box on the cell you would like to enter data for.
4. If using the automated document features of the system, click on the tabs for "other info" and "billing" and complete the applicable fields.
5. Once you have added all pertinent information for this booking, you can click on the "OK" button to save the booking.
6. You may add/modify/delete the automatic booking traces for this group. The traces will correspond to the salesperson who you have indicated.
7. Once you have saved the booking, you will see the event number field filled in.

Edit Booking (under Bookings-Add/Retrieve)

It may be necessary to edit/modify information (e.g. pick-up data, notes) related to a booking. To edit the information, you would first retrieve the booking to the screen. This may be done by using the browse or VCR button options. Once the booking is retrieved to the screen, click on the Edit button. Move around the fields by using the Tab or Enter key (to move forward) and Shift+Tab keys (to move backwards). You may edit/modify the fields by typing over the existing information. Remember, *click on "OK" (top right of screen) to save changes.*

Cancel Booking (under Bookings-Add/Retrieve)



To cancel a booking, you would first retrieve the booking. This may be done by using the browse or VCR button options. Once the booking information is retrieved to the screen, ensure that it is the booking that you wish to cancel. Next, click on the Cancel button (immediately to the right of the Edit button). You will be prompted to enter a cancellation code. You can also create an entry in the sales call file by entering an optional sales call code. Enter a trace data and trace code to trace this cancellation for later follow up. A Lost Business transaction will also be added to the Lost Business database. The notes you enter in the notes window will be copied to the trace and the lost business entry.

Activate Booking (under Bookings-Add/Retrieve)

To re-activate a "canceled" booking, you would first retrieve the booking to the screen. This may be done by using the browse or VCR button options. Once the booking information is retrieved to the screen, ensure that it is the canceled booking that you wish to re-activate. Next, click on the Activate button (immediately to the right of the Edit button). When prompted, click on "OK" to complete the reactivation. (Note: The activate key will only appear on the screen of a canceled booking.)

Merge Booking (under Bookings-Add/Retrieve)

The automated contract/document merge feature works with **Microsoft Word 97, Word 2000 or Word XP**. STS can talk to Word directly initiating the merge process.

Following are the steps to perform the actual contract merge:

STS includes a basic sample contract. This document is a Microsoft Word document that can be modified to suit your needs or used as a training tool to learn what merge codes have been inserted to produce a working contract.

- Within the **Bookings|Add/Retrieve screen**, use the VCR buttons or the Browse feature to locate the booking. Once retrieved, click the **Print** button. Choose Merge Contract/Letters.

- From the list of documents, click on **CONTRACT.DOC** and then **Choose**.

- The *event number plus .CON for an extension* should appear in the Copy To field. Click Merge to begin the merging process. Word will be started, if it is not already open, and the merge process will begin.

- Your document should merge and appear on the screen. You now have a Microsoft Word document on the screen. You may review/change the document (wording, spacing) as needed. When finished, you may print and/or save it. When saving the finished contract you can use long file names in Word. This will allow you to name it anything you would like. If your are adding a date to the name of the document separate the month, day and year with dashes. Word will not allow you to use slashes "/" in a file name.

- Use the same procedures to merge any documents from STS. This would include thank you and cover letters.

BOOKINGS *continued*

Modifying/Editing the Contract Template in Word:

Start Word. Click **File|Open**. Change your directory by clicking on the down arrow to the right of the Look In line. If you are modifying the contract templates from the MAIN (Server) PC, choose the C: drive. If you are modifying the template from another PC, other than the server, locate the server in the drop down list and click on it. Scroll down the directory listing and double click on the **STS** folder and then double click on the **CONTRACT** folder. You should now see your files in the **File Name** list. Click on **Contract.doc** and then **OK**. Modify the contract template as needed, e.g. add hotel name. Once modified, save the document to the same file name. *The same procedures would be used for modifying any merge documents that have been created.*

Creating a New Merge Document in Word 97 or Word 2000:

When creating a new merge document in STS it is easier to open and existing working template and modify it. Once modified you can save the document under a different name. If your contract/letters are very different from the samples provided it may be easier to open your existing Contract/Letters and insert the proper merge fields into them. The steps below outline how to attach a data source and insert merge fields into a new or existing document. It would be easier if you work from the Main Server computer if STS is installed and networked between multiple computers.

1. Start Word on the **SERVER PC**. Click **Tools|Mail Merge**. Click the **Create** button. Choose **Form Letters**. Click **Active Window**.

2. Click the **Get Data** button. Choose **Open Data Source**. In the **File Name** field, type **C:\STS\CONTRACT\CONTRACT.MER** and click **OK**.

3. A dialog box appears informing you that no merge fields were found in your main document. Click the **Edit Main Document** button.

4. You are now returned to the Word document screen. You can start typing text and inserting the appropriate merge fields into the document. (Included with these instructions is the **Microsoft Word-Contract Merge Code** list which outlines all the available merge fields from the bookings section that may be used.)

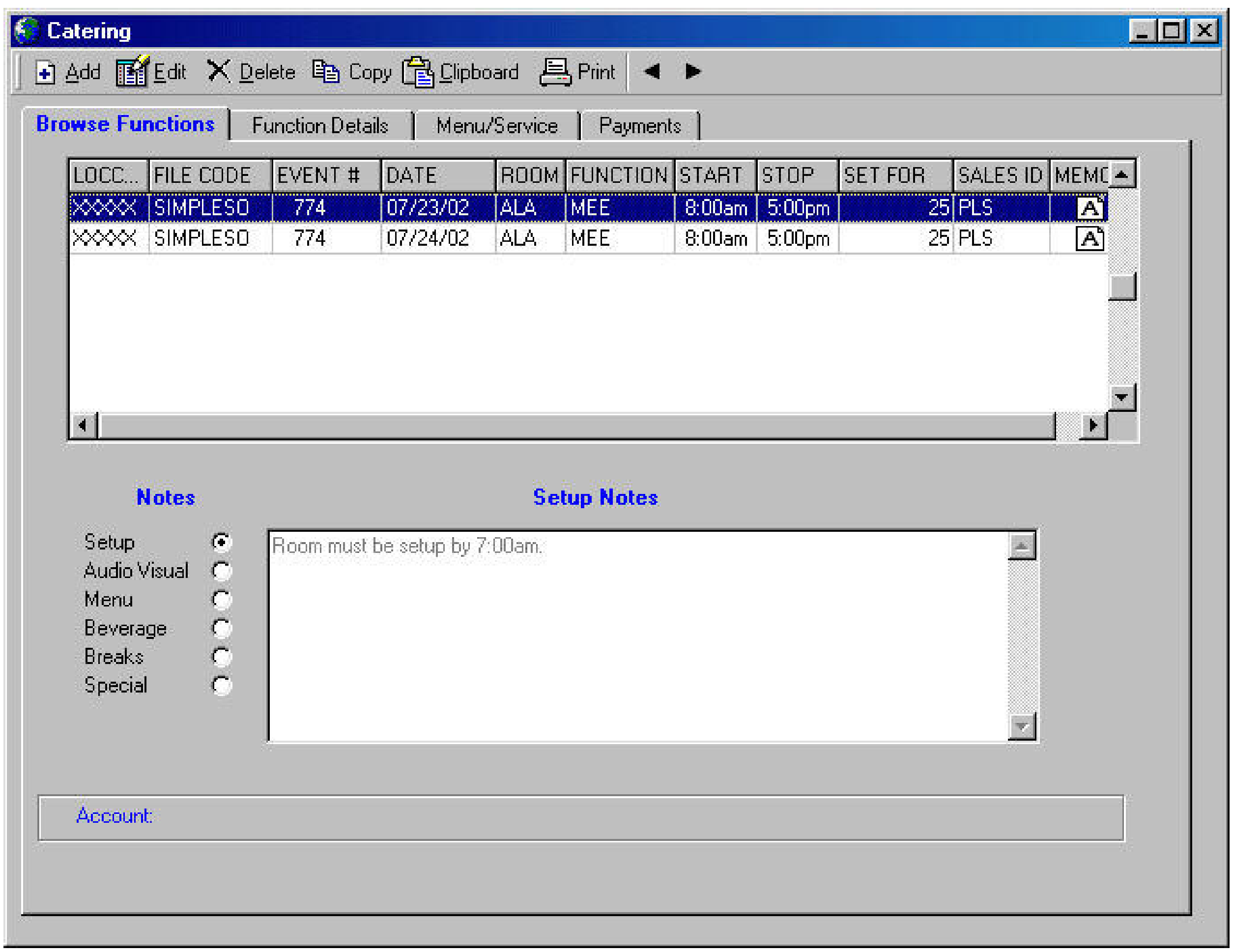
5. Position the cursor where you would like to insert the merge code. Click the **Insert Merge Field** button on the tool bar at the top of the screen. Click on the field you would like to insert. The field will be inserted at the current cursor position in the document.

6. After building your document, save it in the **C:\STS\CONTRACT** (if working from the Main Server computer) folder. Remember the name you give the document as it must be added to the merge document list in the Sales Tracking System. *You have completed all of the steps in Word for building the merge document.*

1. 7. Start STS. Click on **Bookings|Add/Retrieve**. From the Bookings screen, click the **Print** button and then **Merge Contract/Letters**. From the **Merge Documents** screen, click **Add**. Enter the name of the document you created along with the description of the document. You must enter .DOC at the end of the document name when adding it to STS (e.g. PROPOSAL.DOC). Click **OK** to save. You can now choose this new document to merge with the booking information on the screen.

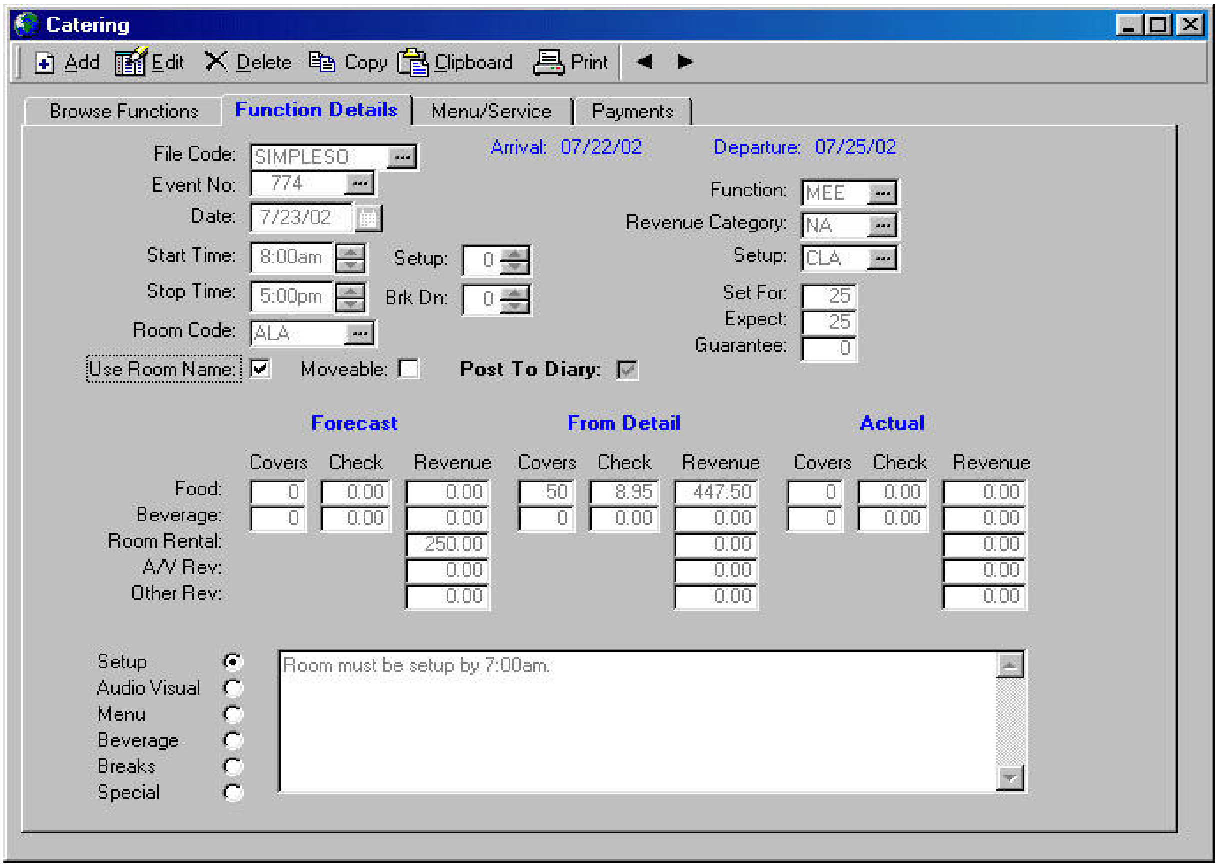
CATERING FUNCTIONS

The Catering Module allows you to enter catering functions for a group booking. When you click the Catering button you will be presented with a screen, similar to the one below, listing any existing functions for this group bookings. From this screen you may Add, Edit or Delete functions. Once you add a function you can add the Menu/Service items you will be charging the client for by utilizing the Menu/Service tab. Finally, if you have a group that will have similar functions for several days you should enter the function for the first day. Then add any menu/service items. Once this is complete you can use the Copy button to copy the function, and the related menu/service items, to a second day. This will save you significant time by not having to enter the menu/service items for each day.



Catering *continued…*

The Function Details screen allows you to enter or edit details for a function.



Most of the fields are self explanatory. Below are descriptions of some of the fields that may need additional explanation.

Use Room Name: This field, if checked, will include the name of the meeting room in the contract.

Post To Diary: This field, if checked, will actually block the space in the function diary. Most functions would have this field checked.

Revenue Category: This field allows the functions revenue to be grouped for later reporting.

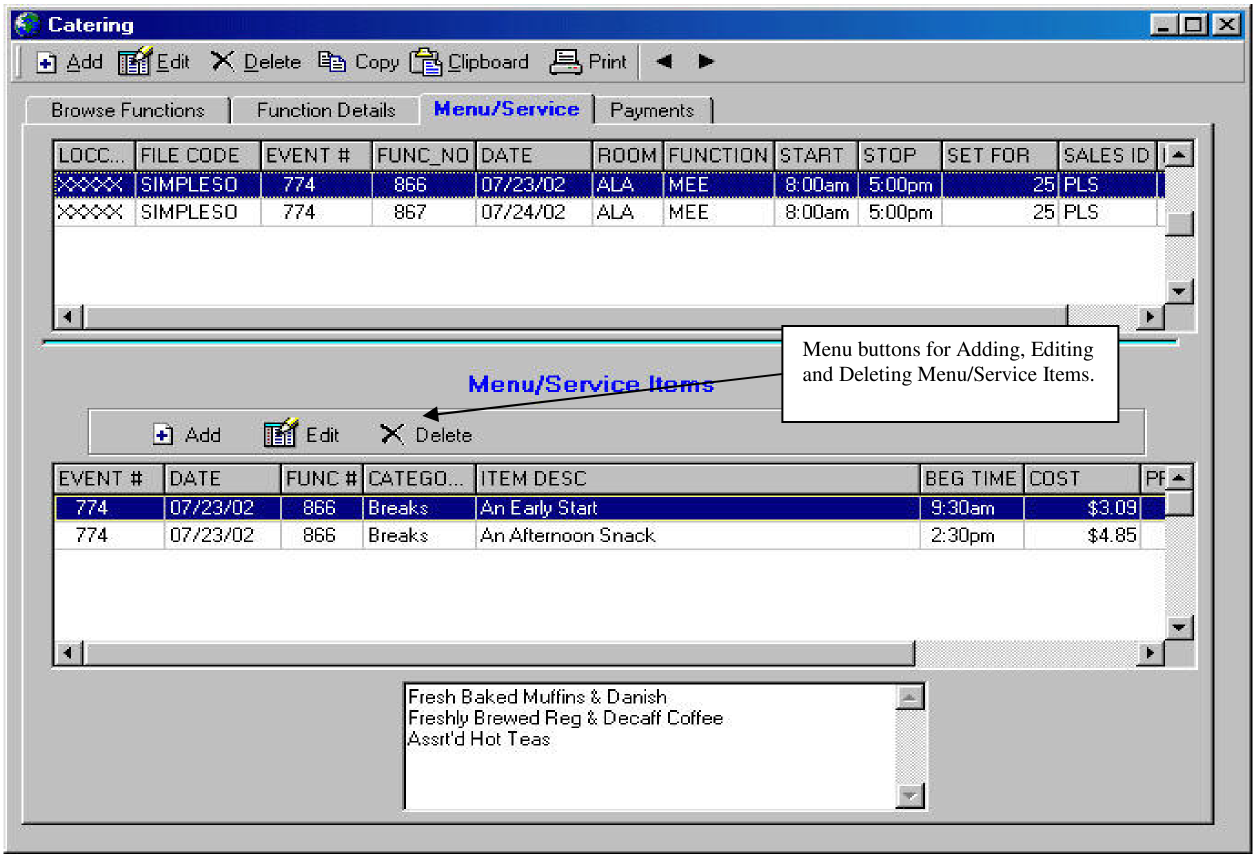
Forecast Section: The Forecast section allows you to enter forecast numbers for a function. Many times the client has not chosen a menu when you are entering the function but we still need numbers for forecast reporting.

From Detail Section: The From Details section will be automatically filled in as you add Menu/Service items to the function. These items are added on the Menu/Service tab.

Actual Section: The Actual section allows you to enter actual numbers after a function is completed.

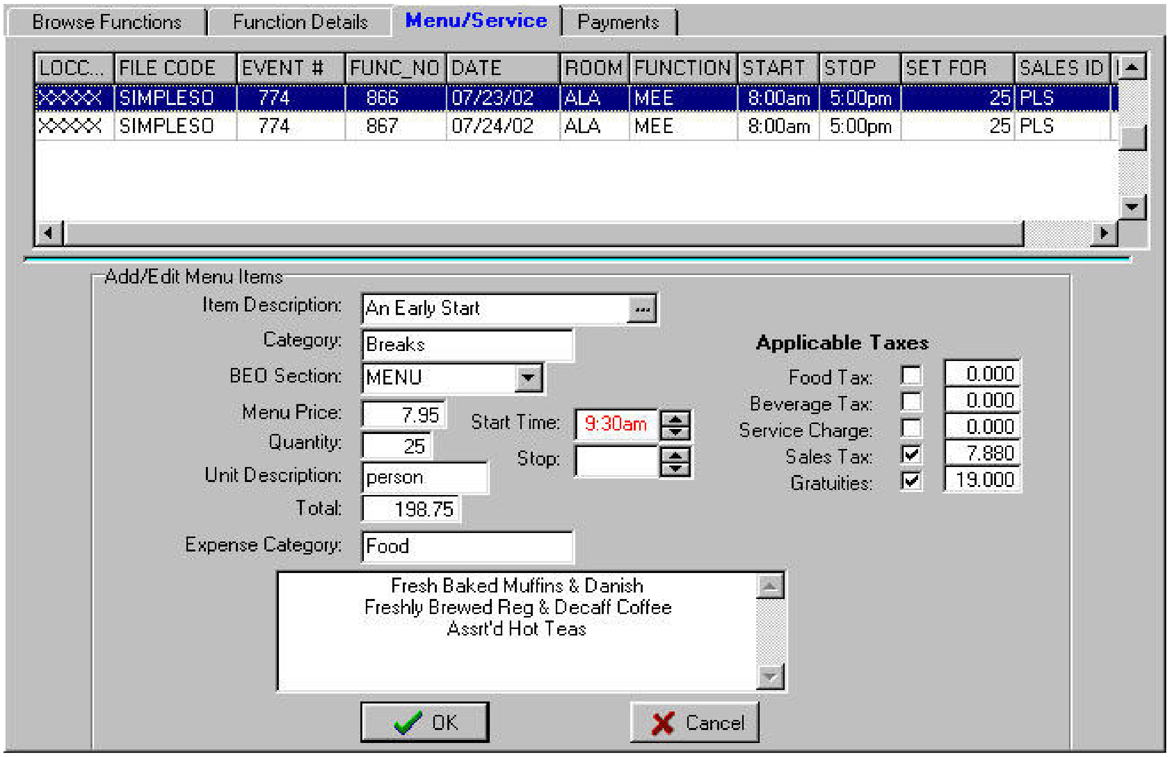
Notes: You can enter notes for Setup, Audio Visual, Menu, Beverage, Breaks and Special sections.

Catering – Menu/Service Tab

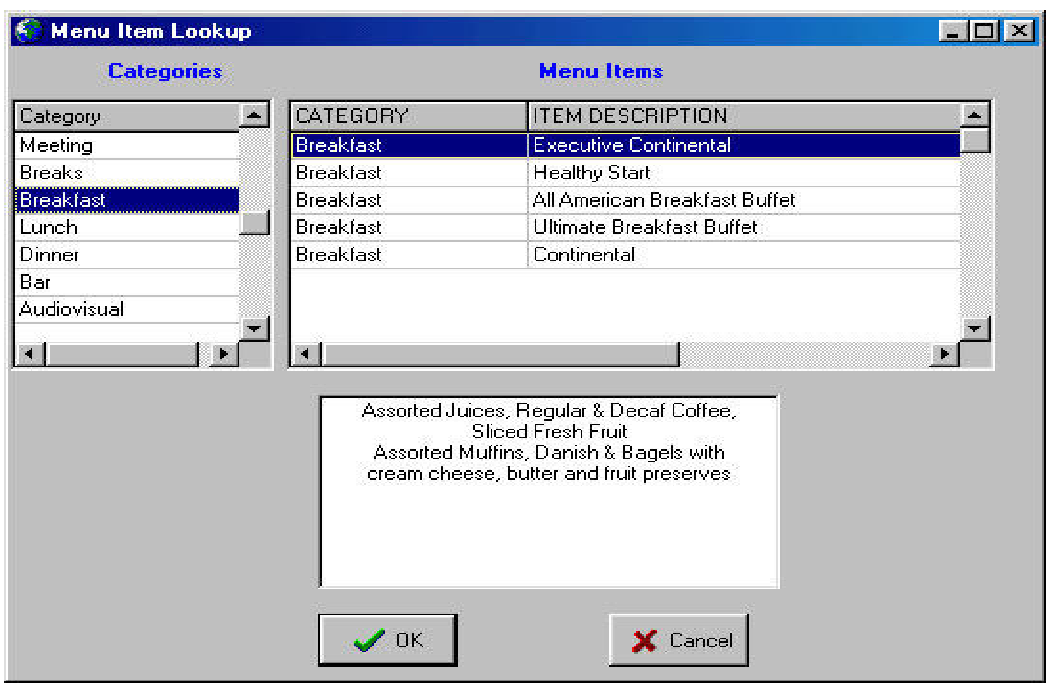


The Menu/Service tab allows you to enter menu/service items. These items can be merged into a banquet event order. Click the Add button to add a new item, Edit to Modify an existing item or Delete to remove an item. The Menu items you add to the lower half of the screen will be attached to whichever Function is highlighted in the upper windows.

Catering – Menu/Service Tab

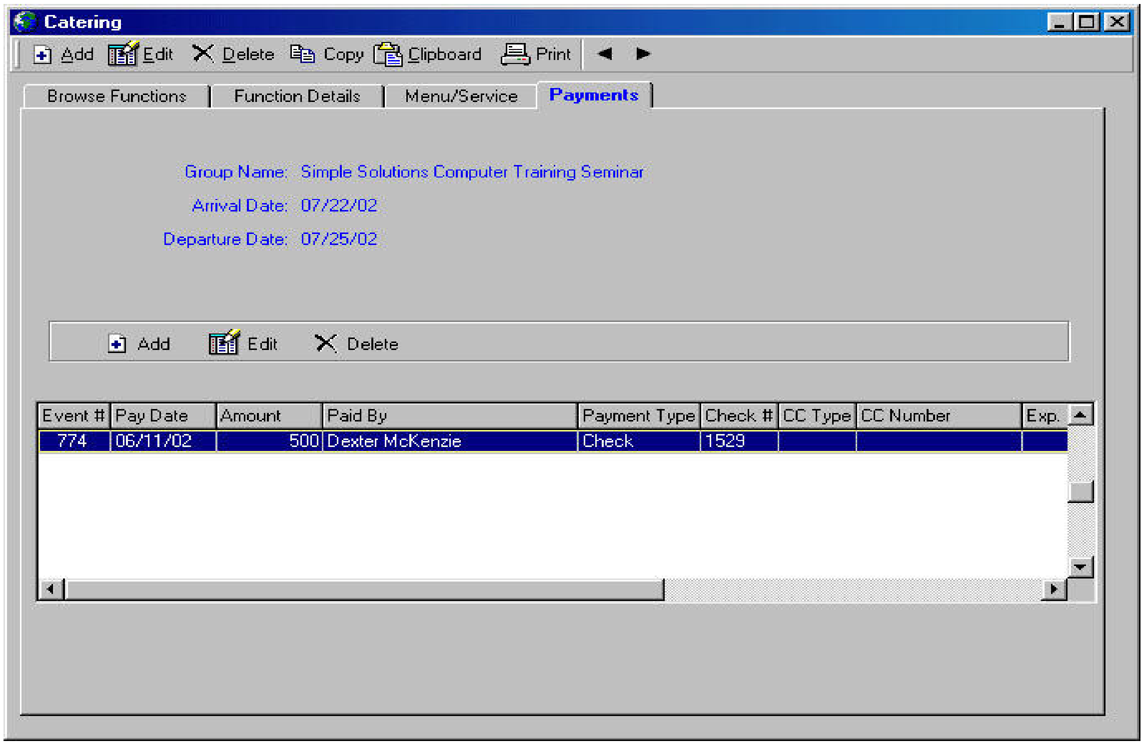


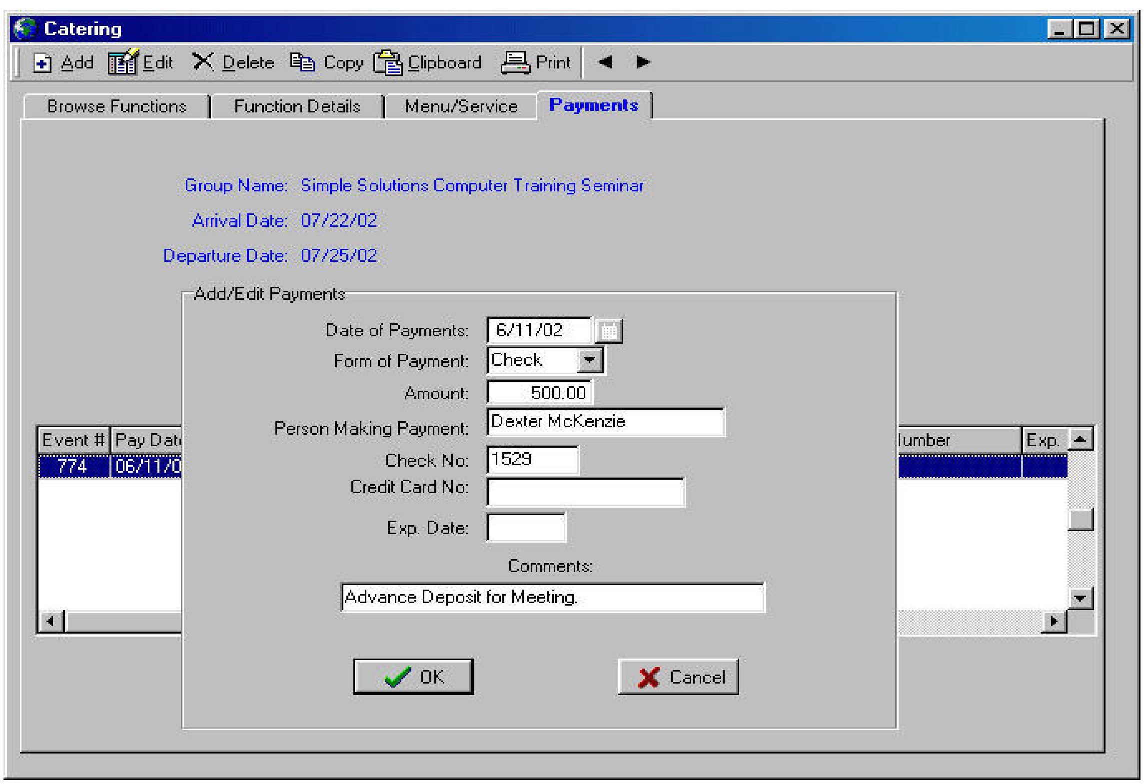
Click the Add button on the Menu/Service toolbar to add a new item. Click the lookup button at the right of the Item Description field to pop up a lookup list of menu items. Once you choose an item, press the Tab key to move to the next field. Many of the fields will be filled in automatically.



Choose the Menu Category from the list on the left. All menu items belonging to that category will be displayed in the list on the right. After locating the desired item, double click on the item to choose it. Fill in the remaining fields on the Add/Edit Menu Item screen and click Ok.

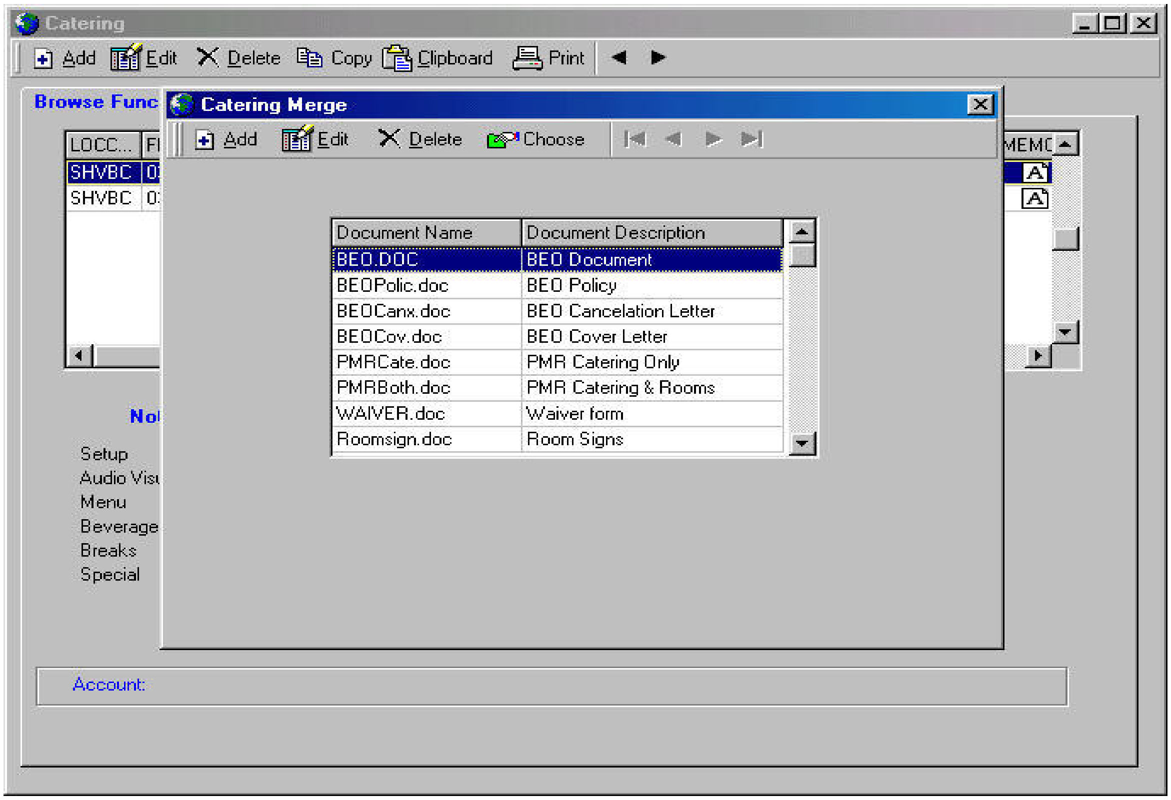
Catering – Payments Tab

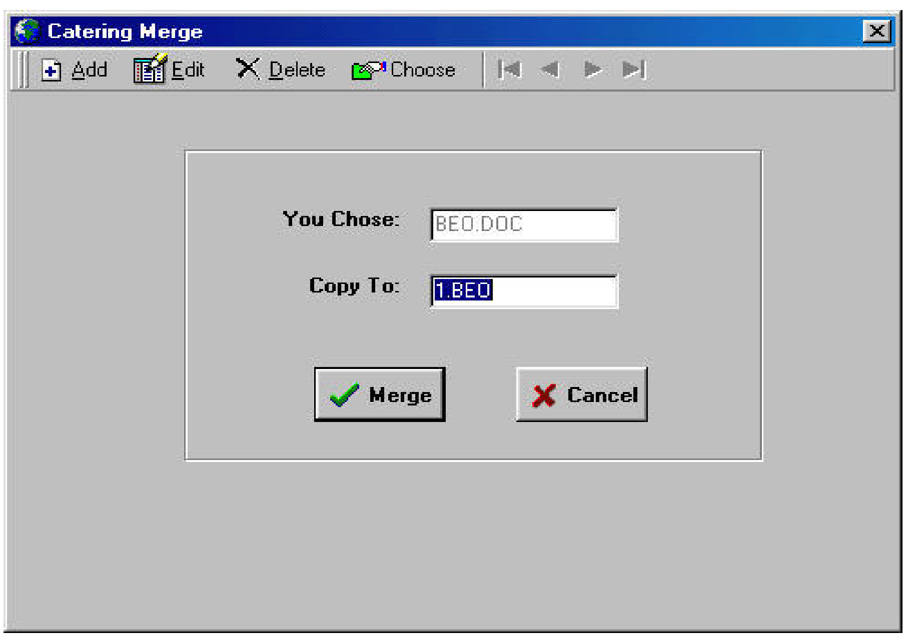




After clicking the Add button you can enter the pertinent information regarding the advance payment for this function. A total of the advance payments will print on the banquet check.

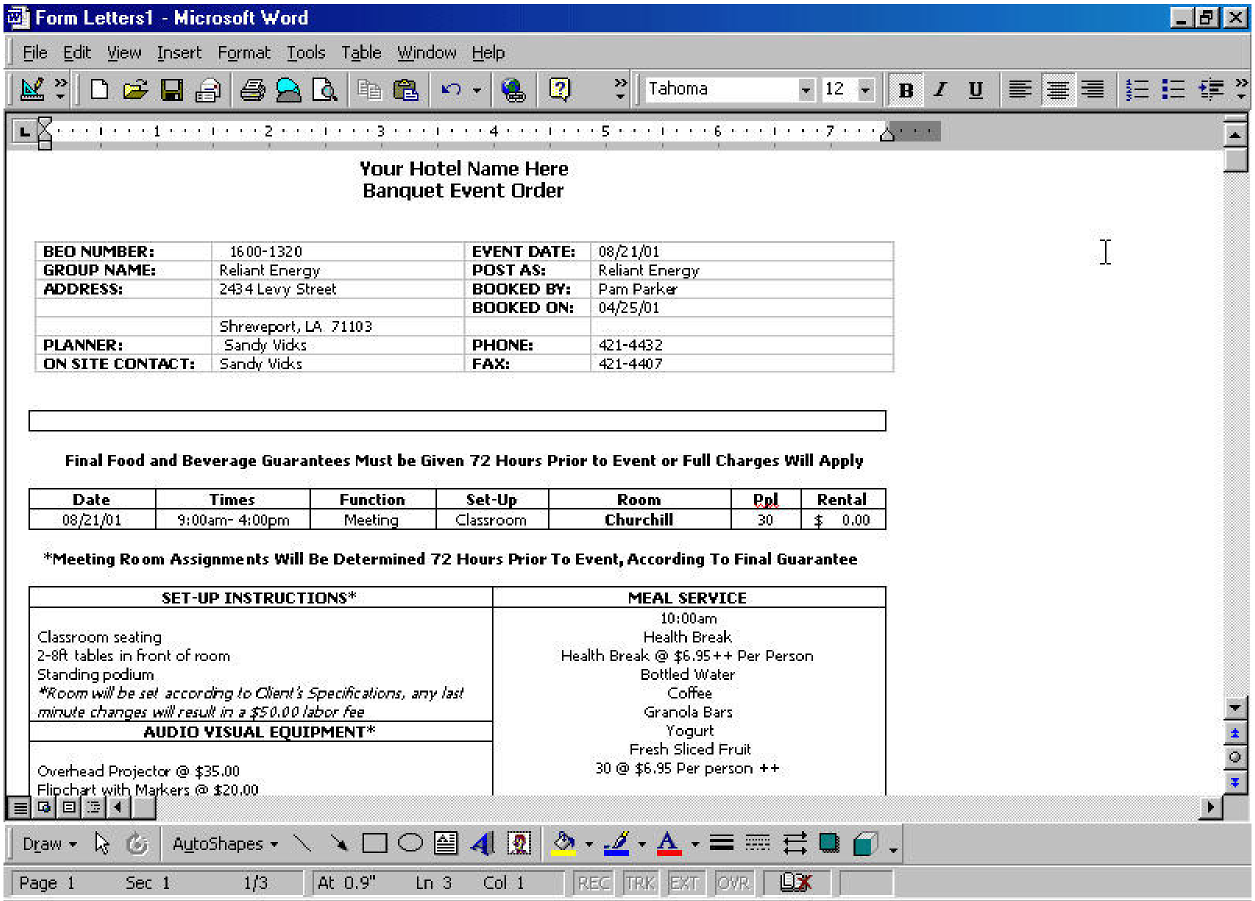
CATERING - Merge BEO





After clicking the Print button and choosing Merge BEO you will be presented with a list of documents to choose from. Double click on the document you would like to merge with. Click the Merge button on the next window to begin the merging process. Microsoft Word will open and the Banquet Event Order will be merged. Once you have reviewed and printed the BEO, close the document in Word before merging another BEO.

CATERING – Merge BEO



Your Hotel Name Here
Banquet Event Order

BEO NUMBER:	1600-1320	**EVENT DATE:**	08/21/01
GROUP NAME:	Reliant Energy	**POST AS:**	Reliant Energy
ADDRESS:	2434 Levy Street	**BOOKED BY:**	Pam Parker
		BOOKED ON:	04/25/01
	Shreveport, LA 71103		
PLANNER:	Sandy Vicks	**PHONE:**	421-4432
ON SITE CONTACT:	Sandy Vicks	**FAX:**	421-4407

Final Food and Beverage Guarantees Must be Given 72 Hours Prior to Event or Full Charges Will Apply

Date	Times	Function	Set-Up	Room	Ppl	Rental
08/21/01	9:00am- 4:00pm	Meeting	Classroom	Churchill	30	$ 0.00

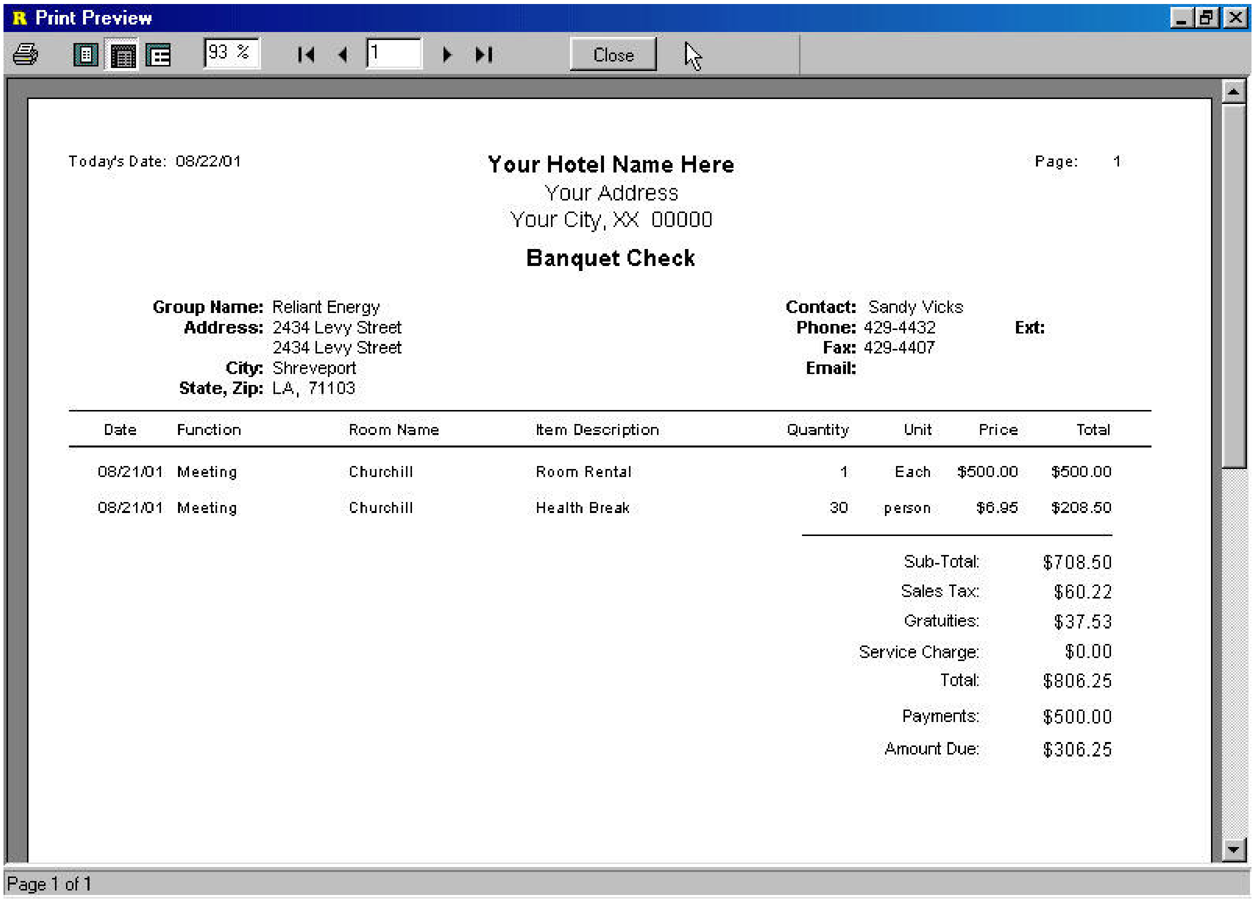
***Meeting Room Assignments Will Be Determined 72 Hours Prior To Event, According To Final Guarantee**

SET-UP INSTRUCTIONS*	MEAL SERVICE
Classroom seating 2-8ft tables in front of room Standing podium **Room will be set according to Client's Specifications, any last minute changes will result in a $50.00 labor fee*	10:00am Health Break Health Break @ $6.95++ Per Person Bottled Water Coffee Granola Bars Yogurt Fresh Sliced Fruit 30 @ $6.95 Per person ++
AUDIO VISUAL EQUIPMENT* Overhead Projector @ $35.00 Flipchart with Markers @ $20.00	

(sample BEO)

Microsoft Word will open and the Banquet Event Order will be merged. You can save the BEO if you would like. Once you have reviewed and printed the BEO, close the document in Word before merging another BEO. After closing the BEO you will see the BEO template with the merge tags. You should also close the template and return to a blank Word screen before returning to STS to merge another BEO.

CATERING - Print Banquet Check


Print Preview

Close

Today's Date: 08/22/01

Your Hotel Name Here

Your Address

Your City, XX 00000

Banquet Check

Page: 1

Group Name: Reliant Energy
Address: 2434 Levy Street
2434 Levy Street
City: Shreveport
State, Zip: LA, 71103

Contact: Sandy Vicks
Phone: 429-4432 **Ext:**
Fax: 429-4407
Email:

Date	Function	Room Name	Item Description	Quantity	Unit	Price	Total
08/21/01	Meeting	Churchill	Room Rental	1	Each	$500.00	$500.00
08/21/01	Meeting	Churchill	Health Break	30	person	$6.95	$208.50

Sub-Total:	$708.50
Sales Tax:	$60.22
Gratuities:	$37.53
Service Charge:	$0.00
Total:	$806.25
Payments:	$500.00
Amount Due:	$306.25

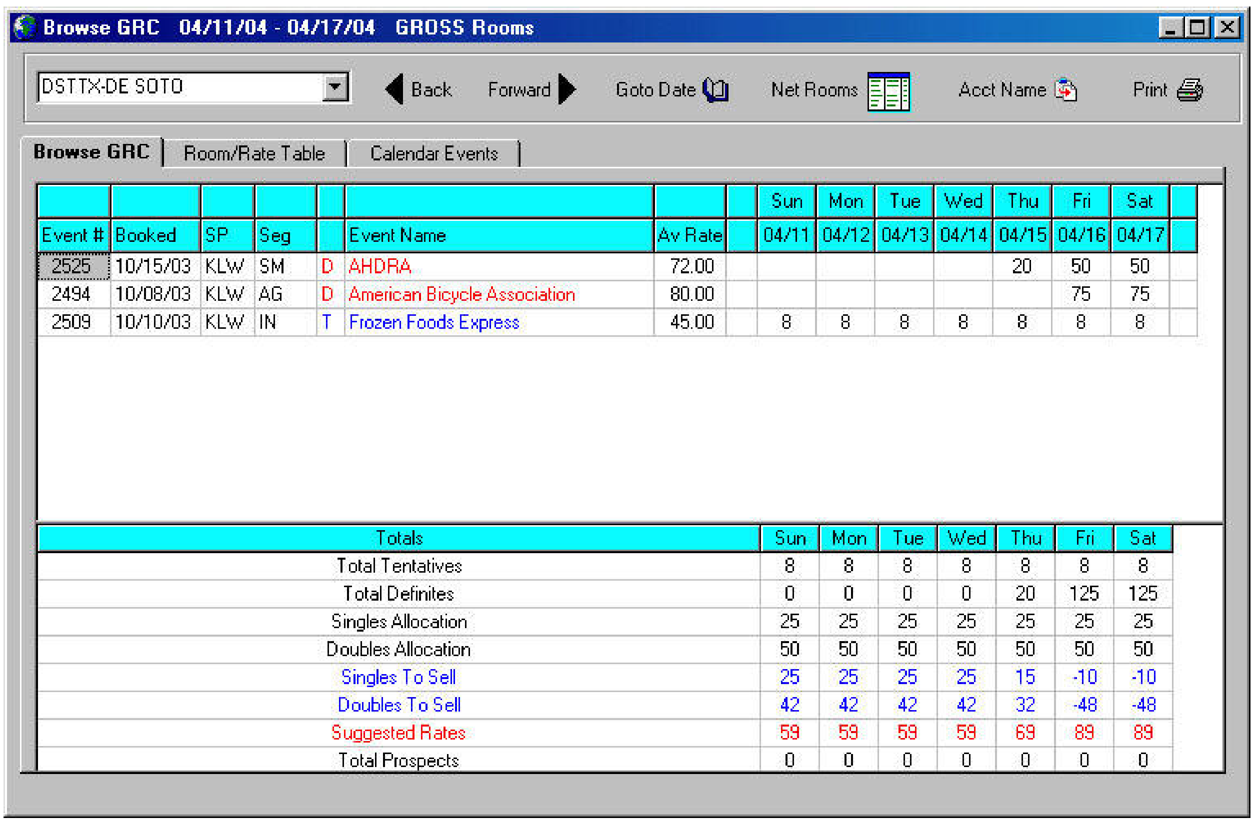
Page 1 of 1

The Banquet Check prints all of the Menu/Service items that have been added for a function. This would include anything you would like to charge the client for.

From the Catering window, click Print and then choose Banquet Check. You can print separate checks for each day by clicking the “Print One Page Per Day” box. Click the OK button on the next window that appears. The banquet check will print to the screen.

BROWSE GRC

This screen allows you to "browse" your GRC (group rooms control) on the screen. You can also print a copy of that screen utilizing the Print button at the top of the screen. The NET button on the Browse GRC screen will reduce the block and show you what you expect the group to actually pick up. Clicking the button again will display the Actual Pick Up for a group. You must be utilizing the Wash % field on the booking screen for the NET button to work effectively. The Wash % allows you to identify what percentage of the group you anticipate will "NOT" show up. It is recommended you enter a Wash % on groups (especially smerf/social type groups) where you do not anticipate the group will pick up their entire room block. This will increase the accuracy of your forecasts as you will be able to print out the "NET" rooms versus the "GROSS" (the amount the client says they will pick up).

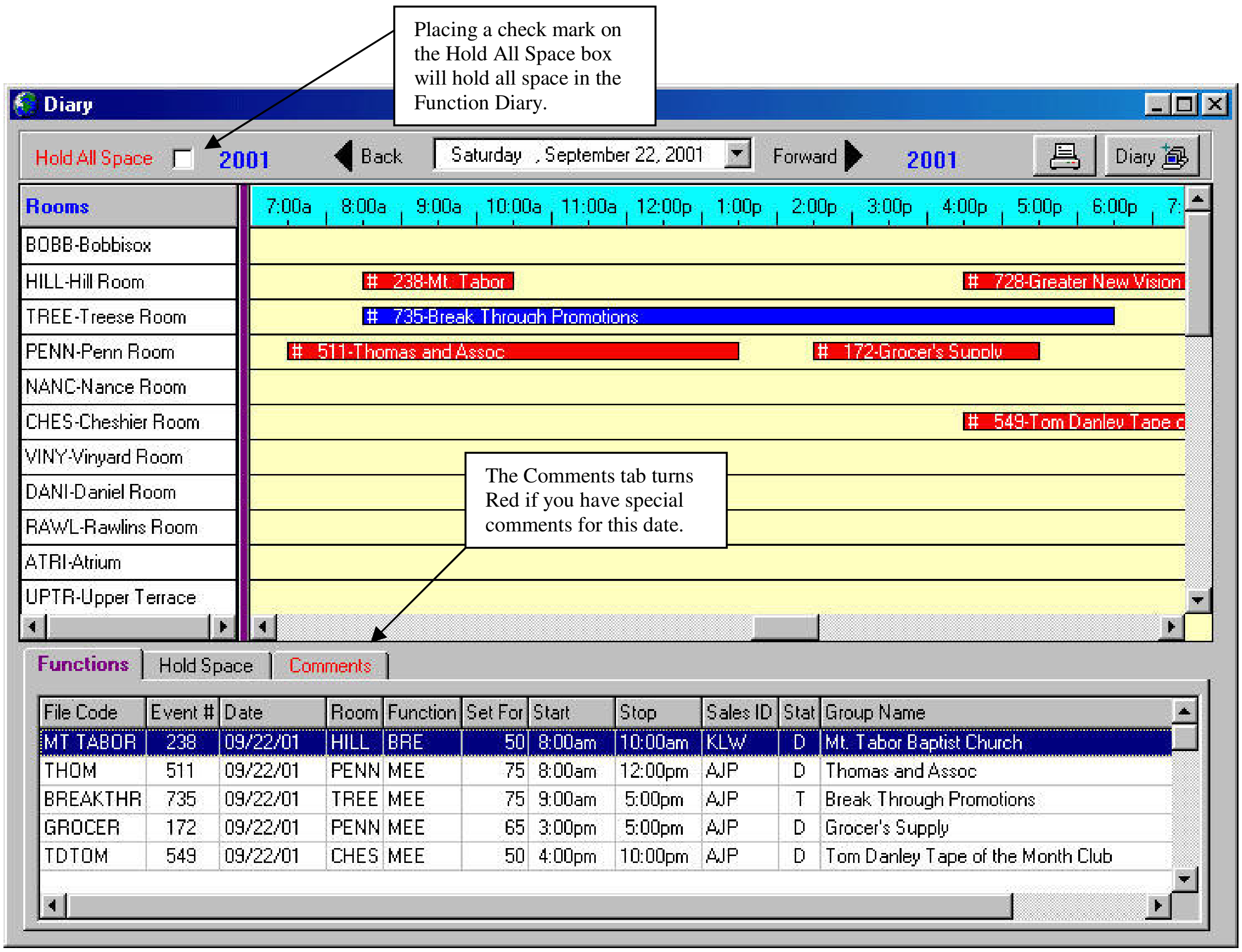


Groups will be sorted by Status and the name of the group displayed in different colors (Red-Definite, Blue-Tentative, Teal-Prospect).

The Calendar Events tab will display in Red if there are notes for one of the dates displayed. Clicking the Calendar Events tab will display the notes. The Calendar Events tab is also the screen where you can add comments for a specific date.

FUNCTION DIARY

This screen allows you to view the Function Diary. The top part of the screen will list all of your meeting space along with any functions occupying that space. The event number and name of the group will be displayed in the time bar. The bottom of the Diary screen will display additional information including function type, how many to set for, sales person who owns that function and whether the function is definite or tentative status. The Back and Forward buttons skip backwards and forward one day at a time. You may also click the down arrow to the right of the date to pop up a calendar which you can choose a date from.



The bars on the function diary are displayed in 4 colors:

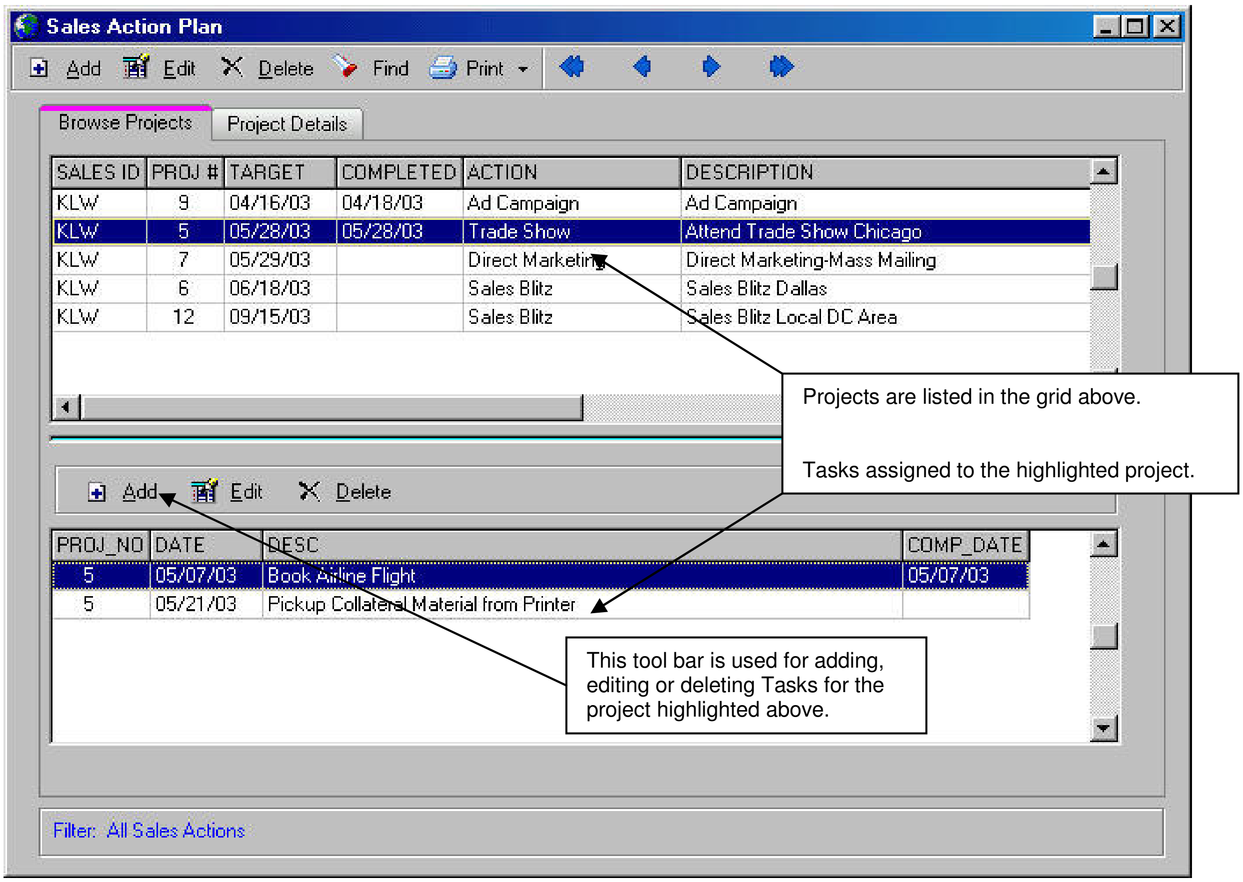
- Red – Definite
- Blue – Tentative
- Teal – Prospect
- Maroon – Hold

The Hold Space tab allows you to place a Hold on a meeting room.

The Comments tab allows you to enter special events comments for a certain date. The Comments tab will be displayed in Red if there are comments for that date.

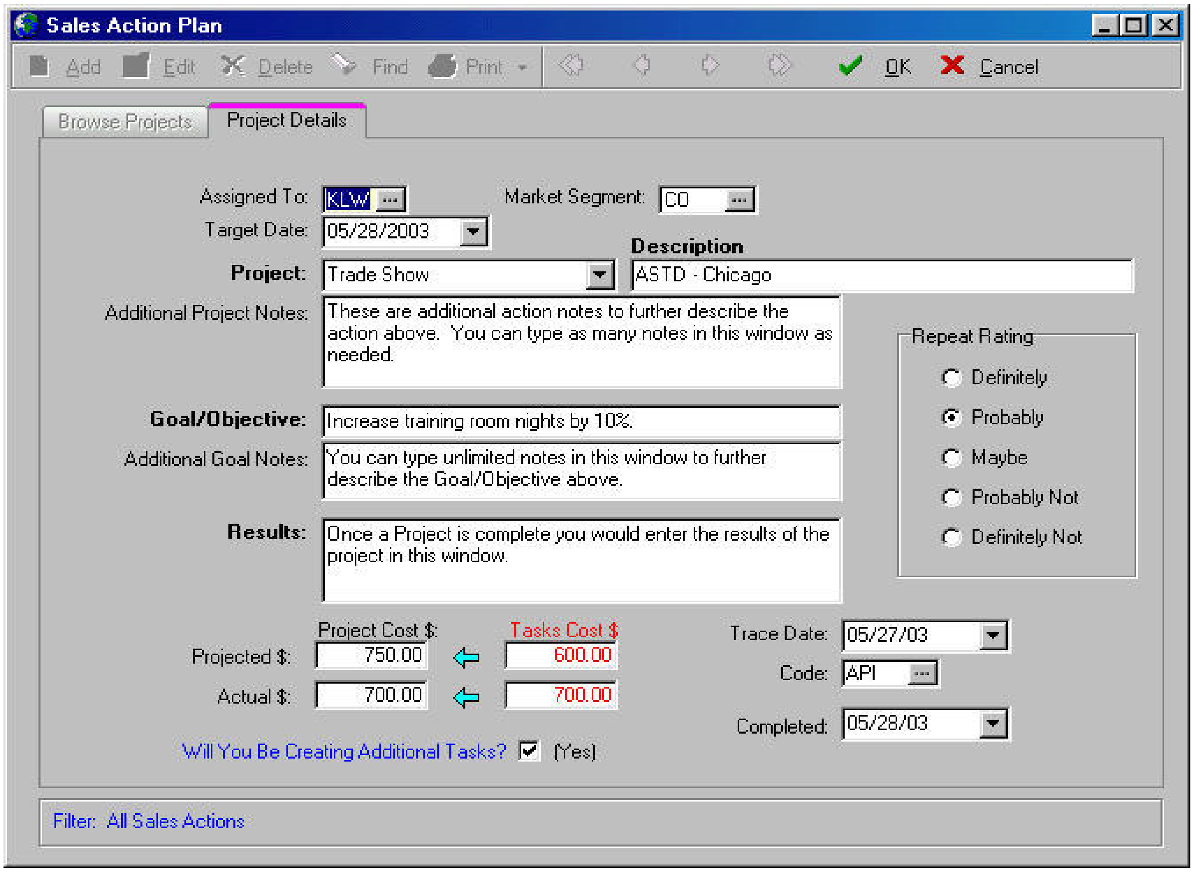
SALES ACTION PLAN

The Sales Action Plan module is a full-featured project management tool that allows sales people to enter and track major sales objectives for the future. Not only can you enter the details of the Project but assign "Tasks" that are needed to support the Project. Also, you can trace tasks that are assigned to projects, and these traces will appear with your other traces. Additionally, you can assign costs, by general ledger code, and produce budget reports making your budgeting process easier.



The tool bar at the top of the screen is used for Adding, Editing, Deleting or Finding Projects. Once a Project is added you can then use the tool bar above the lower grid to add Project Tasks.

Sales Action Plan – Adding Projects

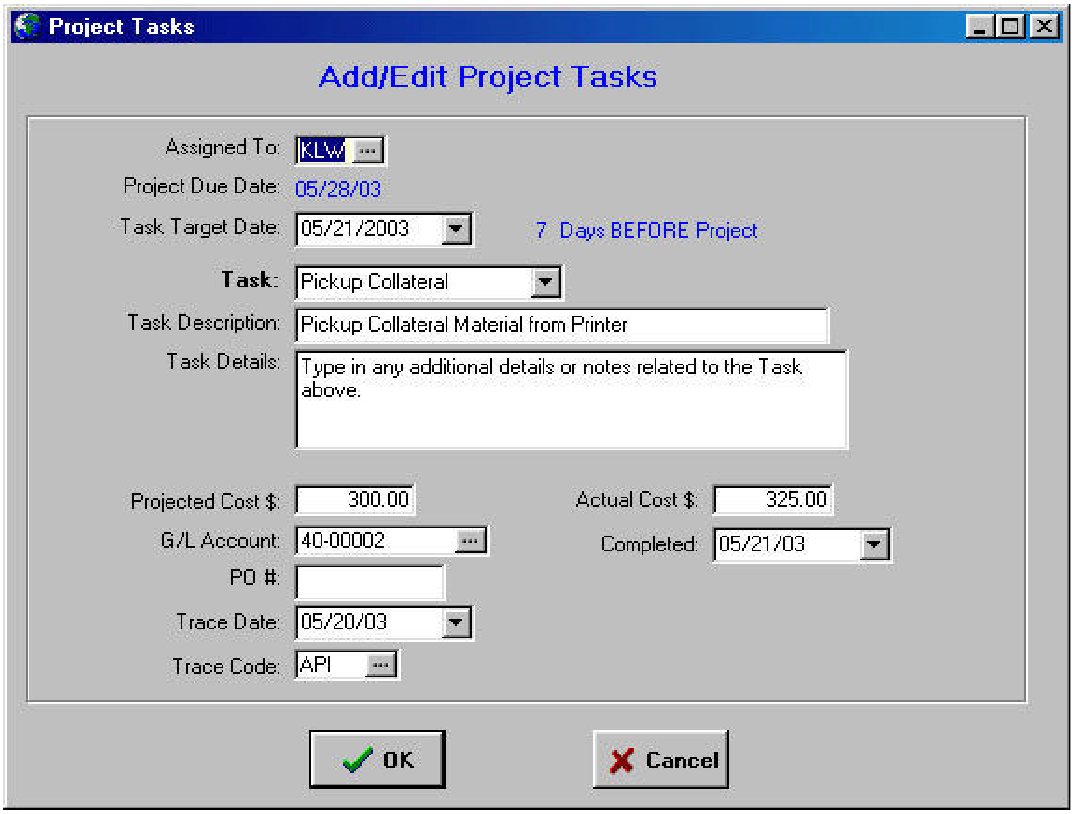


To Add a new Project, click the Add button on the tool bar. Below find descriptions of each field:

- **Assigned To** – Salesperson the Project is assigned to.
- **Market Segment** – Segment you are targeting with this Project.
- **Target Date** – Target completion date of the Project.
- **Project** – Choose a Project from the drop down list. Project codes can be added in Utilities | Table Maintenance | Action Plan Codes.
- **Description** – You can describe the project in this field.
- **Additional Project Notes** – Use this space to fully describe the Project.
- **Goal/Objective** – Describe the Goal/Objective of this project.
- **Additional Goal Notes** – If needed, you can use this space to further describe the Goal/Objective.
- **Results** – After the Project is completed, use this space to describe, in detail, if you achieved the desired Goal/Objective as a result of this Project.
- **Projected Costs $** - Enter the "Projected" forecast cost of the project. The Actual $ (dollars) under Project Cost would only be entered after the project is completed.
- **Tasks Cost $** - The Task Cost fields are "read only". You cannot enter numbers directly into these fields; task cost amounts are updated automatically as you add Tasks.
- **Will You Be Creating Additional Tasks?** – Each project should have at least 1 task associated with it. This box should be checked if you will be "manually" adding Tasks for the Project. If you check this box an "Add Task" screen will appear automatically when you save the Project. If you do not check this box, a Task will be automatically added for you. You may Edit the Task as necessary.
- **Trace Date/Code** – Use these fields to automatically add a trace for the Project.
- **Completed** – Enter the date the Project is completed.
- **Repeat Rating** – Once you have completed a Project, rate the Project for the likelihood of repeating this Project in the future.

Sales Action Plan – Adding Tasks

Project "Tasks" are the real detail of what processes and activities need to occur to properly support a Project. Once a Project has been added, you can click on the Add button, on the lower toolbar on the Browse Project screen, to add Project Tasks.

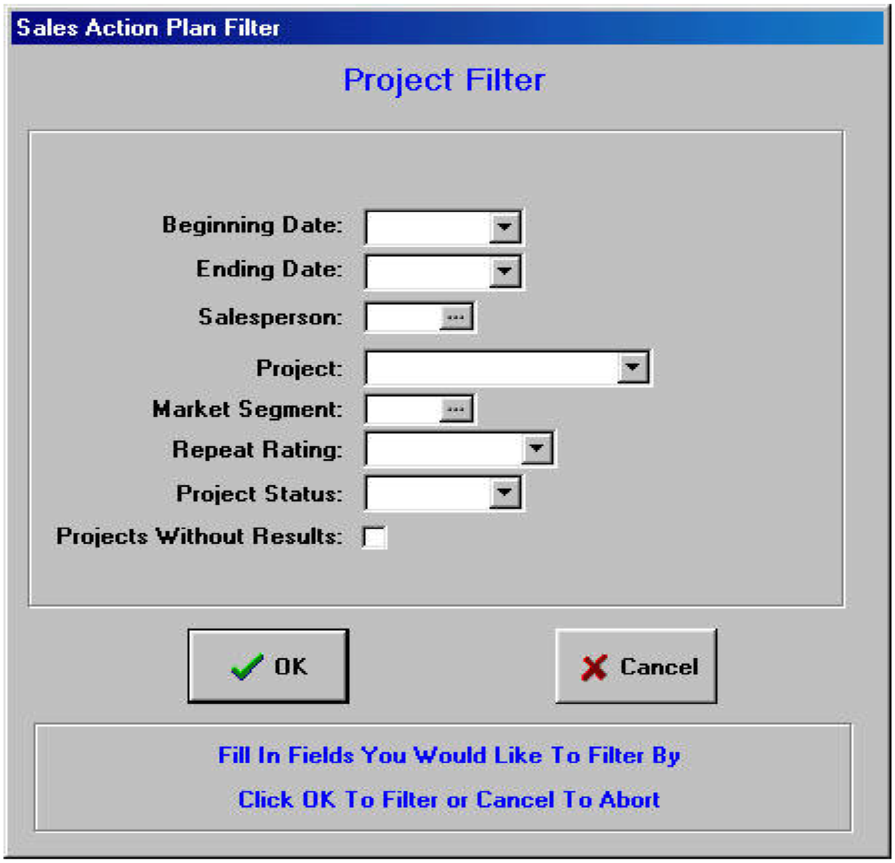


Below find descriptions of each field:

- **Assigned To** – Salesperson to whom the Project is assigned.
- **Project Due Date** – Project completion due date.
- **Task Target Date** – Target completion date of the Task you are adding. Once you enter a date and tab off the field, the number of days before/after the Project due date will be calculated and displayed.
- **Task** – Choose a Task Code from the drop down list. Task codes can be added in Utilities | Table Maintenance | Project Tasks Codes.
- **Task Description** – You can describe the Task in this field.
- **Task Details** – Use this space to further describe the Task.
- **Projected Costs $** - Enter the "Projected" forecast cost of the Task.
- **G/L Account** – You can assign the cost of this task to a G/L Account. Doing so will allow you to print a Budget Report detailing the forecast costs by month.
- **PO #** - You can enter a Purchase Order number that is associated with this Task.
- **Trace Date/Code** – Use these fields to add a trace for the Task.
- **Actual Cost $** - Once the Task is completed, you can enter the Actual Cost incurred for this Task.
- **Completed** – Enter the date the Task is completed.

Sales Action Plan – Find

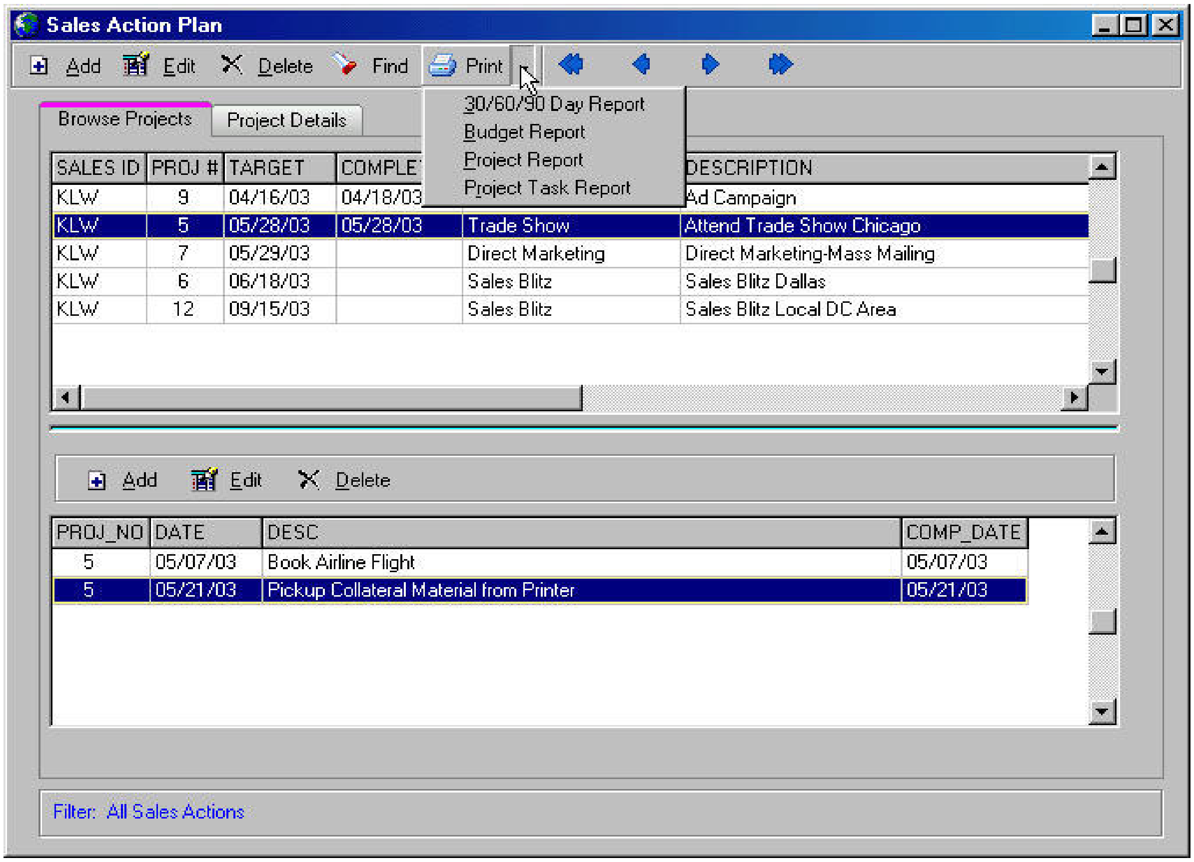
The Find button on the Project screen allows you to "Find" Projects based on some or all of the criteria below.



Enter information in the fields by which you would like to search. Leave the other fields blank. The more fields you fill in, the more specific the search.

Sales Action Plan – Print Report

You have a choice of 4 different reports relating to the Sales Action Plan module in STS. Click on the down arrow to the right of the Print button on the Projects toolbar. Below please find descriptions of each report.



30/60/90 Day Report – This report will prompt you for a starting month, year and salesperson's id. The report will then print all Project activity along with associated Tasks.

Budget Report – The Budget Report will print Task costs, by G/L Code, by Month. You must add Tasks for each Project and enter the proper G/L Code, on the Task screen, for this report to be meaningful. If utilized properly, this report is a good tool for budgeting next year's Sales/Marketing Actions.

Project Report – This report will print all Projects that fall within the criteria entered on the Find screen. Each Project and the associated Tasks will be printed.

Project Task Report – The main focus of this report are the Project "Tasks". This report would be synonymous with a "To-Do" list for the project. It is recommended that this report be printed on a regular basis to view upcoming tasks and target dates.

REPORTS

ACCOUNT REPORTS

Total Room Nights
The Total Room Nights report will print the total room nights tracked per account for the user specified period of time. The report will be sorted by the highest producer first.

Total Rooms-7 Day
The Total Rooms-7 Day report will print all accounts tracked, by day of week, for the user specified period of time. The user decides the beginning date and how many weeks to print the report for.

Total Rooms-1 Account
The Total Rooms-1 Account will print the total room nights tracked for one account. It will print all tracking transactions entered for this account for the user specified period of time. Day of week statistics with print at the end of the report. These statistics are the heart of the report detailing the accounts production by day of the week.

Total Rooms By Salesperson
The Total Rooms By Salesperson report totals and prints account tracking data by sales person. The totals are broken down by Individual, Group and Total consumption.

Total Rooms By Account By Segment
The Total Rooms By Account By Segment report totals and prints account tracking data by account and market segment for the user specified period of time.

New Account Report
The New Account Report prints accounts that have been added to the system for the user specified period of time. It also prints rooms, rate and revenue generated by these accounts.

Account Overview
The Account Overview report will print all basic information on file for an account. This includes most fields on the account screen plus all contacts and sales calls on file for the account. This report can be run for one account or any number of accounts by filtering by Segment, Salesperson or User Fields, to name a few.

Month-End Report
The Month-End Report prints monthly occupancy, average rate and revenue for the specified month. It compares these actual number against the budget for the same period. It also recaps the Group Rooms Production statistics.

Sales Call Stat Report
The Sales Call Stat Report will print statistics on how many sales calls of each type a salesperson has made between the requested period of time.

Monthly Sales Statistics
The Monthly Sales Statistics Report prints the Top 20 Sources of Business, Target Account Hit List and the Top 5 Groups. The Top 20 Sources of Business is generated from Daily Tracking transactions. The Top 5 Groups are derived from the actual Pickup entered for each group booking.

Weekly Sales Report
The Weekly Sales Report print Month To Date occupancy, rate and room revenue totals. It also prints New Group Business booked, Sales Call Statistics, Sales Calls and the Weekly Appointment Schedule for the specified sales person.

GROUP REPORTS

Groups On The Books Report
The Groups On The Books Report prints all booked groups for a user specified period of time. Each group arriving during the requested time period will be printed along with summary statistics at the end of the report. This report can be used as a future forecast or past history report.

Groups 10 Day Report
The Groups 10 Day Report prints all booked groups for a 10 day period. This report will print blocked rooms compared against pick up by day.

Monthly GRC By Day Report (legal paper)
This report is generated for the user request time period. It details each group which is inhouse during the requested period. It details how many rooms they have blocked, by day. This report prints on **legal paper** in landscape mode (sideways).

Arrivals/InHouse Report
This report prints all groups arriving, departing or inhouse for the user specified period of time. It includes important information on each group such as Account/Group Name, Arrival Date, Departure Date, Rooms Blocked, Rate/Revenue, Contact Information, Billing, Method of Payment and Comments. It also prints the meeting/catering itinerary for the group. This report prints on **legal paper** in landscape mode (sideways).

Pace Report
The Pace Report prints group business on the books for the next 18 months. It also compares this activity against the Group Segment Budget and the Same Time Last Year. The Same Time Last Year line will print zeros until the hotel has collected history for 1 year.

Annual Report By Month
This report prints group business booked in the year for the year. Months after the month chosen will print Blocked rooms, rate and revenue. Past months will print Actual Pickup that has been entered on the Pickup Tab for each group. Finally, the budget for Group market segments will print with variances.

Top Group Report
This report prints the top groups for a user specified period of time.

Production (Reports | Production)

Rooms Production w/Detail
The user specifies the beginning and ending dates to generate this report. This report details what group business was produced (booked) DURING the specified report dates for the future. The report separates and sub-totals by tentative and definite business.

Rooms Production - Current Month vs Goals
This report prints room production totals for a specified month by sales person. It also prints YTD totals by sales person. The report breaks down Definite production into New Definite, Definite Changes and Definite Canceled columns. The Net Definite room nights will be compared against the sales person's monthly productions goals. The Monthly Production Goals can be added from the Main Menu | Budget | Room Production Goals.

Catering Production w/Detail
The user specifies the beginning and ending dates to generate this report. This report details what catering business was produced (booked) DURING the specified report dates for the future. The report separates and sub-totals by tentative and definite business for each sales person.

CATERING REPORTS

Catering Events
The Catering Events Report prints each function inhouse during a user specified period of time. It details pertinent information such as group name, function room, function type, start and stop time and revenue generated by the function. It also prints any notes entered for each function.

Daily Function Sheet
The Daily Function Sheet Report prints each function inhouse during a user specified period of time. This report is also known as a "10 Day" report. It details pertinent information on each catering event. It does not print revenue. It is designed to be distributed throughout the hotel for an easy to read reference on what catering/meeting events are in house each day.

Reader Board
The Reader Board report prints the catering functions for the specified date. It utilizes Microsoft Word to merge the information to a Word merge document. This document, **READERBD.DOC**, is located in the **\STS\CONTRACT** folder on the server computer.

Annual Revenue By Month
This report prints catering revenue, by month, in the year for the year. Months after the month chosen will print Forecast revenues. Past months will print Actual revenues. Finally, the catering budget will print with variances.

Pace Report
The Pace Report prints group business on the books for the next 18 months. It also compares this activity against the Catering Revenue Budget and the Same Time Last Year. The Same Time Last Year line will print zeros until the hotel has collected history for 1 year.

Hold Space Report
The Hold Space Report prints holds that have been place on meeting space for the user specified period of time.

OTHER REPORTS

Market Share Report
The Market Share Report prints your actual occupancy, rate and revenue for the month specified. It compares these totals against the hotel's budget for the same period. It also calculates and prints Fair Market Share and Penetration for your hotel and how it compares against your competitive set.

Market Segment Report – Segment vs Budget
This report totals tracking data by market segment and compares it against their respective budget.

Market Segment Report – Segment vs Last Year
This report totals tracking data by market segment and compares it against tracking for the same period last year.

Sales Call Stat Report
This report totals and prints sales call statistics by Call Type. It then compares these totals against monthly sales call goals by sales person.

MAIL MERGE – Existing Label File

Below is an outline of what needs to be completed to merge STS contact information into Microsoft Word. *These steps use the example label merge file included with STS.*

1. Click Reports | Mail Merge | Merge Contacts. A Contact Filter screen will appear. This screen will allow you to specify which contacts you would like to have included in the merge file.

2. Fill in the fields accordingly and click OK. You can mix and match the information entered into these fields to be as specific or general as needed. If you wanted all corporate contacts within a certain zip code you would enter a valid segment code and a beginning and ending zip code. If you wanted all contacts you leave all fields blank and click OK.

3. Once you have entered the appropriate filter information and clicked OK, the system will begin creating the merge file. The name of the file being created will be displayed. Please note the file name as you will need it later. Also the system begins to count the number of contacts that meet the criteria specified. When the process is completed, you will see "All Finished" and the number of contacts that will be merged.

4. Click the Close button. The rest of the steps are performed in Word. The steps below use a sample label document named **STS Labels.DOC**. This document is installed during the installation of STS. The steps would be the same for any Word merge document you may have created.

5. Start Word. Click File | Open. Navigate to the \STS\LABELS folder. Open **STS Labels.DOC**.

6. Click Tools | Mail Merge | Merge | Merge. Word will perform the merge and display the labels on the screen. The sample LABEL1 was created using Avery 5160 label format. This format prints 3 labels across and 10 rows down.

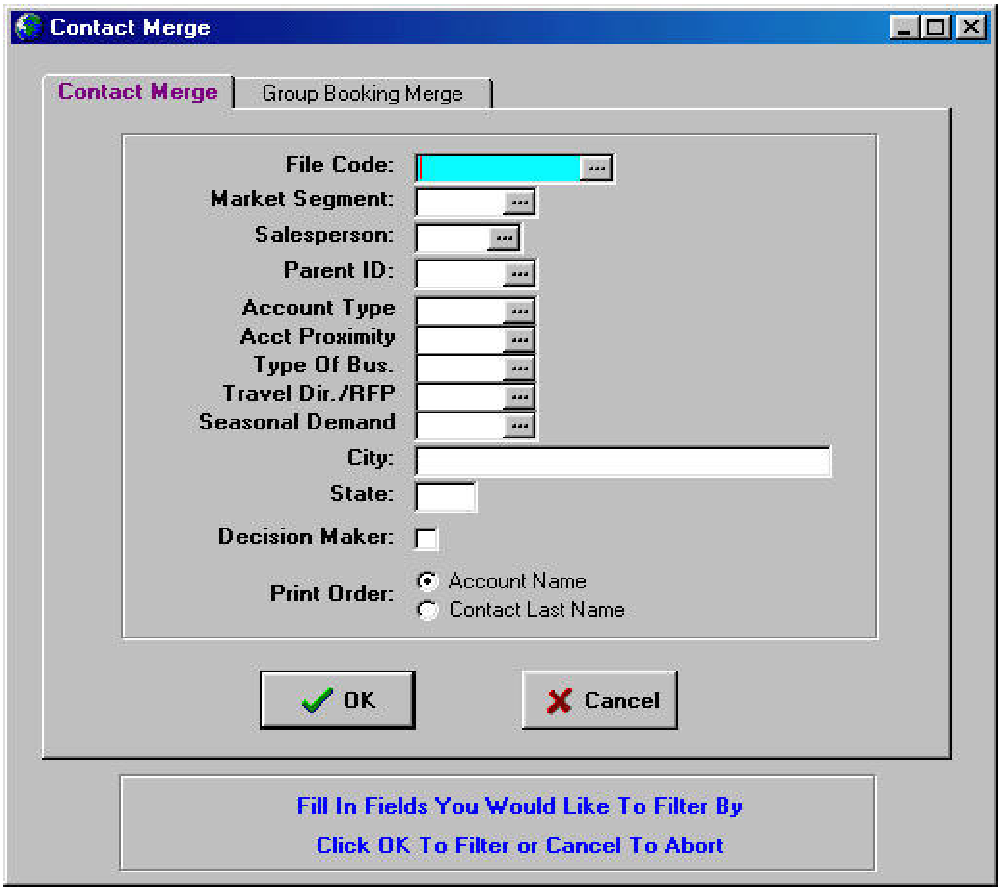
7. Once the labels are merged and printed you can close the documents. If you will be printing multiple copies of the names you have merged, you can save the document for retrieving/printing later.

8. Finally, if you would like to merge contacts with a different criteria, you can exit Word and then return to STS and follow the steps above to generate a new merge file. Open Word again and follow the merge steps. You must close the current merge document displaying contact information before returning to STS to generate a new merge file.

MAIL MERGE – Creating a New Label File (Word 97 / Word 2000)

Below is an outline of what needs to be completed to merge STS contact information into Microsoft Word. *These steps assume you are **creating a new** Word mailmerge document.*

1. Click Reports | Mail Merge | Merge Contacts. A Contact Filter screen will appear. This screen will allow you to specify which contacts you would like to have included in the merge file.



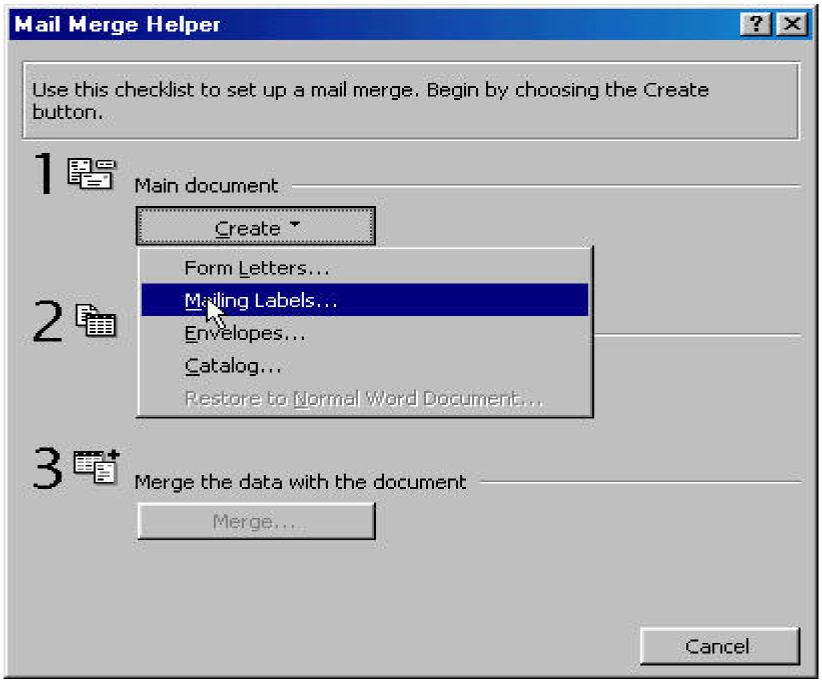
2. Fill in the fields accordingly and click OK. You can mix and match the information entered into these fields to be as specific or general as needed. If you wanted all corporate contacts within a certain zip code you would enter a valid segment code and a beginning and ending zip code. If you wanted all contacts you leave all fields blank and click OK.

3. Once you have entered the appropriate filter information and clicked OK, the system will begin creating the merge file. The name of the file being created will be displayed. Please note the file name as you will need it later. Also the system begins to count the number of contacts that meet the criteria specified. When the process is completed you will see "All Finished" and the number of contacts that will be merged.

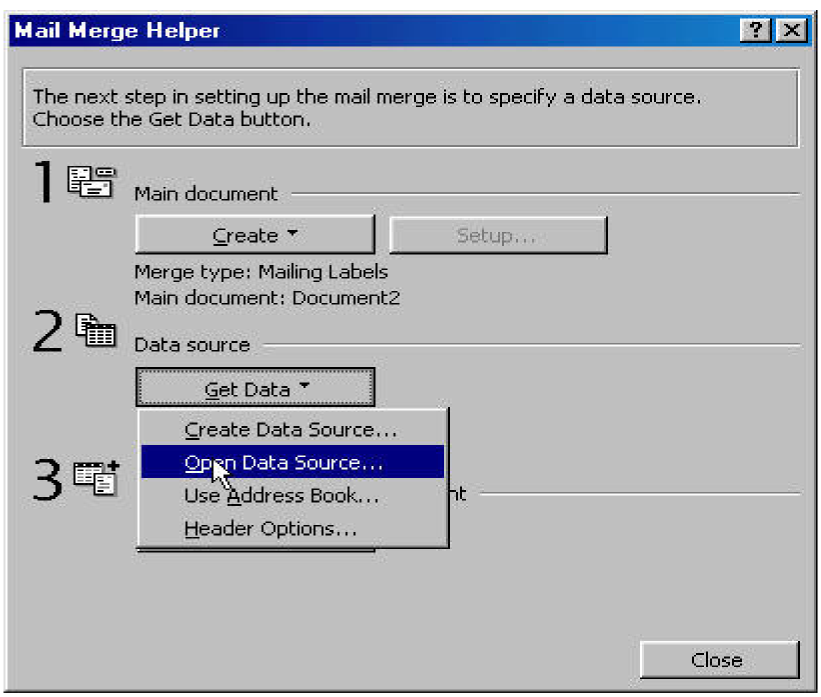
4. Click the Close button. The rest of the steps are performed in Word. The steps below walk you through creating a label document.

Mail Merge – *continued…*

5. Start Word. Click Tools | Mail Merge. When the Mail Merge Helper is displayed click **Create** and then **Mailing Labels**. Then click Active Window.

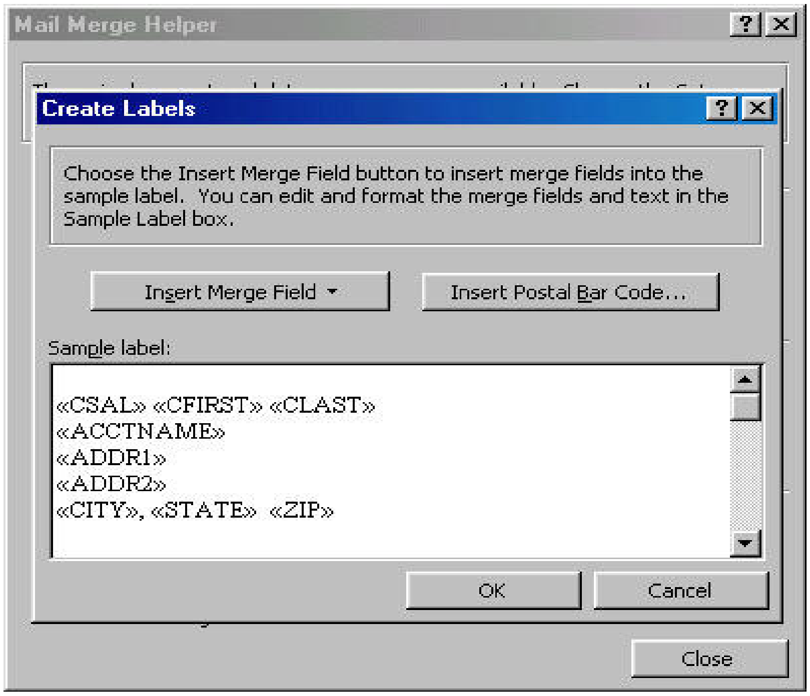


6. Next click the Get Data button and then Open Data Source. Navigate to the \STS folder. Open CONWORD.XXX. You may need to change the "Files of type:" at the bottom of the screen to list All Files. Click Set Up Main Document. If you would like to print 3 across and 10 down labels, choose 5160 – Address.



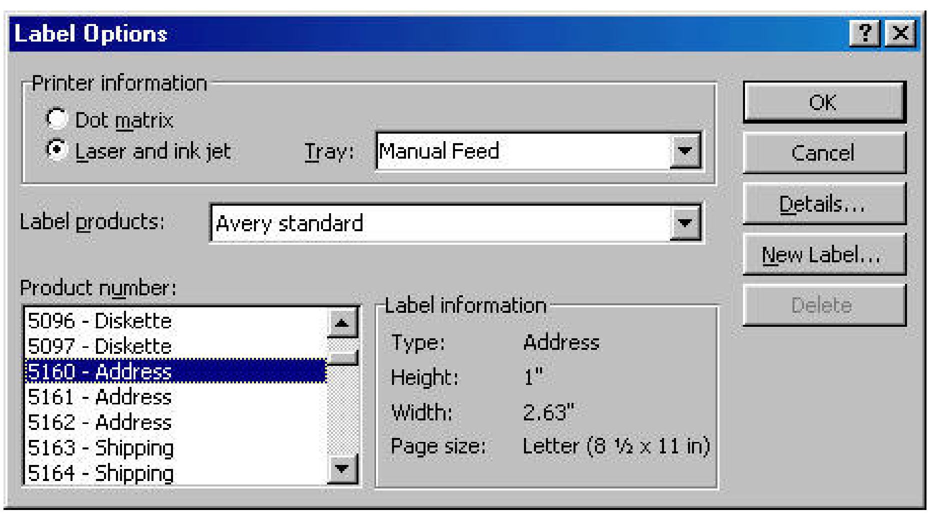
Mail Merge – *continued…*

7. You should now see a Create Labels window with an Insert Merge Field button. Click the Insert Merge Field button and choose CSAL (contact's personal title). Press the space bar. Click the Insert Merge Field button again and choose CFIRST (contact's first name). Press the space bar. Click the Insert button and choose CLAST (contact's last name). Press the Enter key. You should repeat clicking the Insert Merge Field button and insert the following fields:



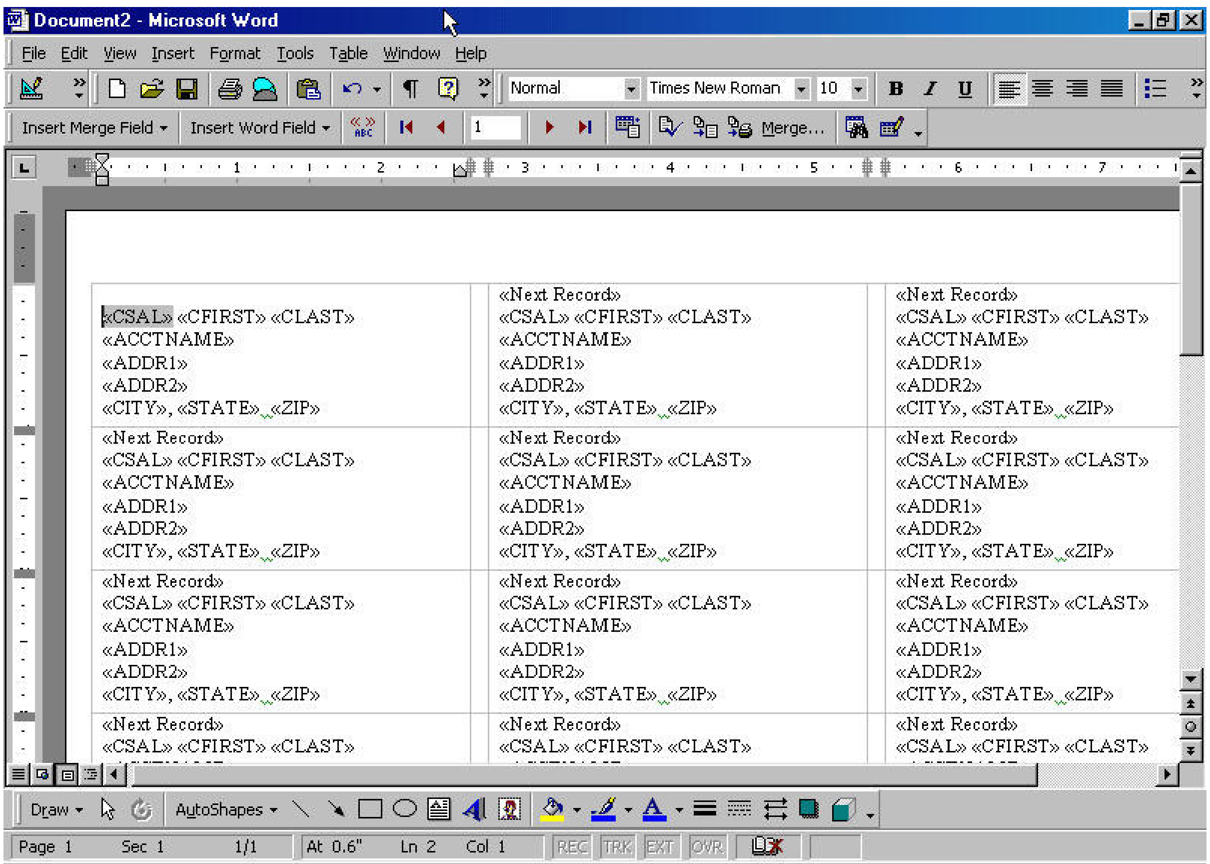
8. Click OK once you have inserted the codes above.

9. Click Merge | Merge. Word will perform the merge and display the labels on the screen. The sample LABEL1 was created using Avery 5160 label format. This format prints 3 labels across and 10 rows down. You can print these labels at this time.



Mail Merge – Creating a New Label File *continued*

10. Once the labels are merged and/or printed, close the document with the names and addresses. You do not need to save the document that has the actual names and address's as you can re-merge any time you would like. You **DO** want to save the template (see example below) that is displayed with the merge codes on it. You can open this document any time in the future and re-merge labels from your contacts' file.

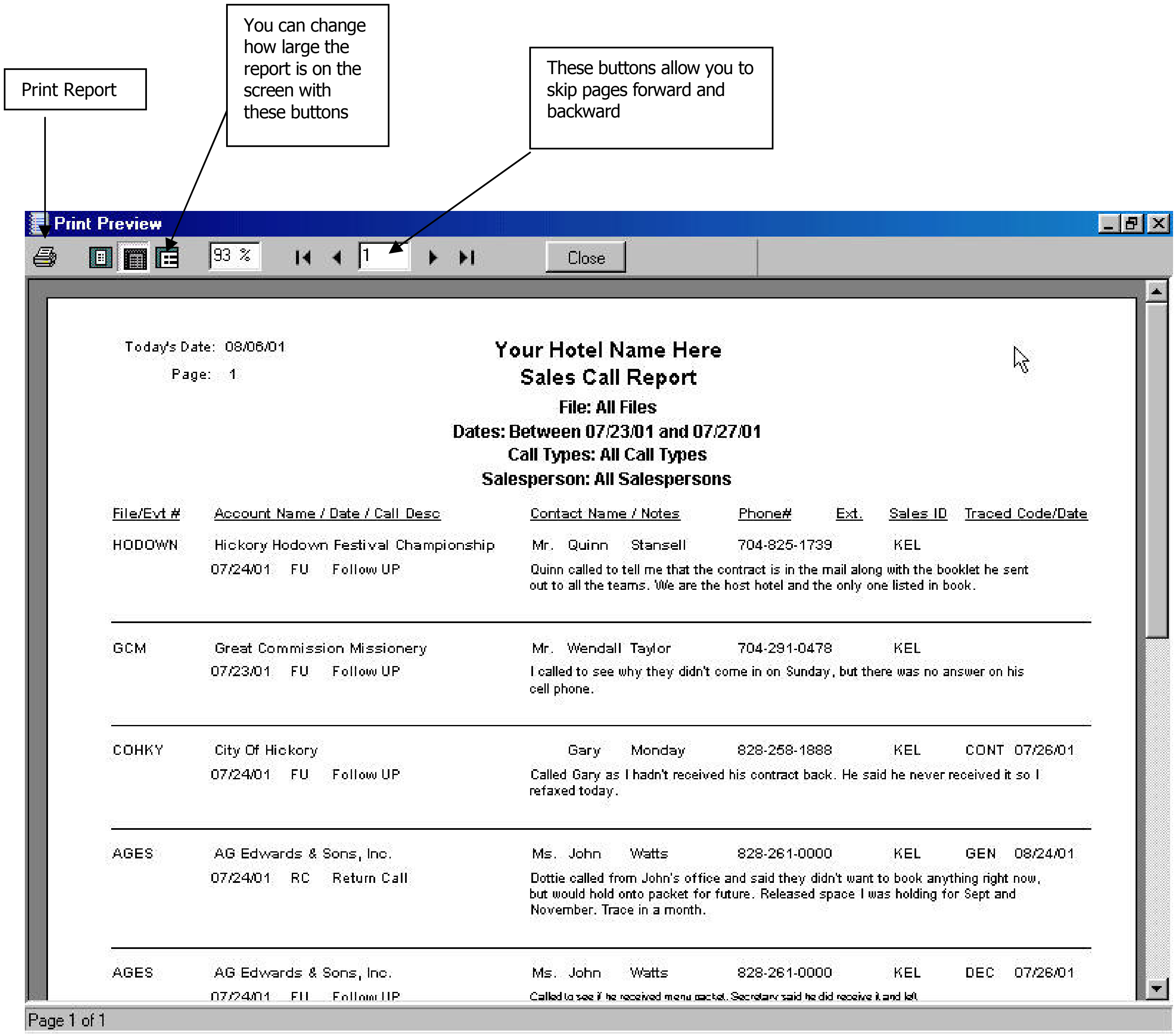


11. When you are ready to merge contacts again with this file, you can follow the instructions for Mail Merge – Existing Label File. Substitute Label1.doc with the name of the file you just saved.

EMAILING REPORTS

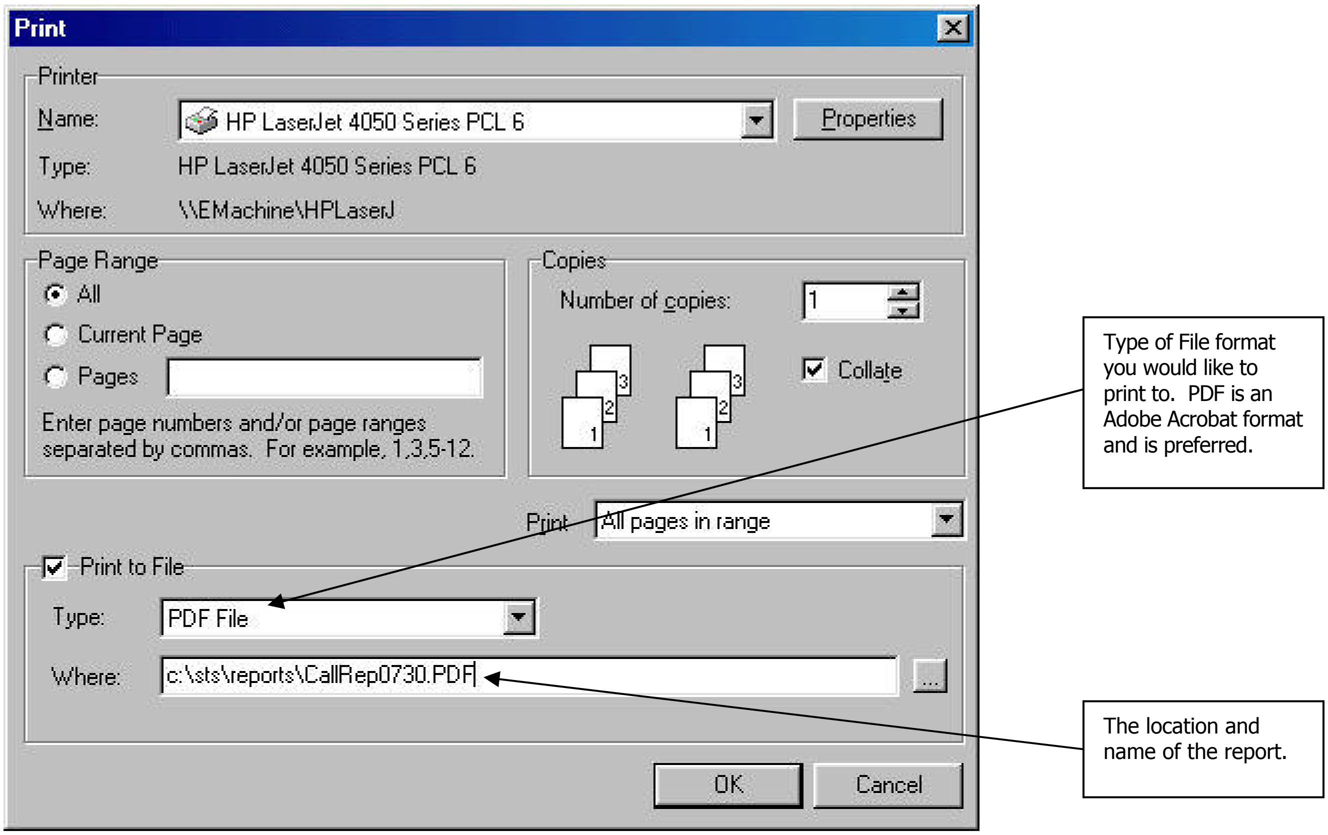
Reports – Printing to a File

Below is an illustration of a sales call report. Notice the icons at the top of the report. The icons on the previous version of STS were located at the bottom of the report.



STS allows you to print reports to several popular file formats. Once a report is printed to a file it can be attached to an email. See the next page for details on printing a report to a file.

Reports – Printing to a File

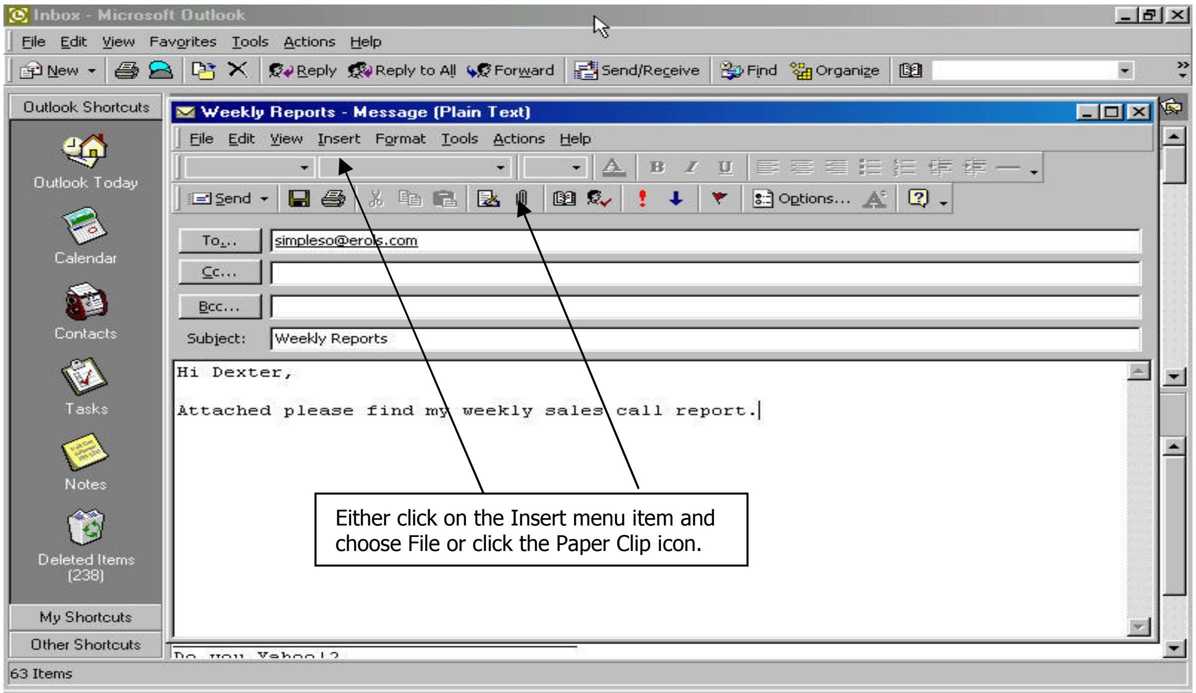


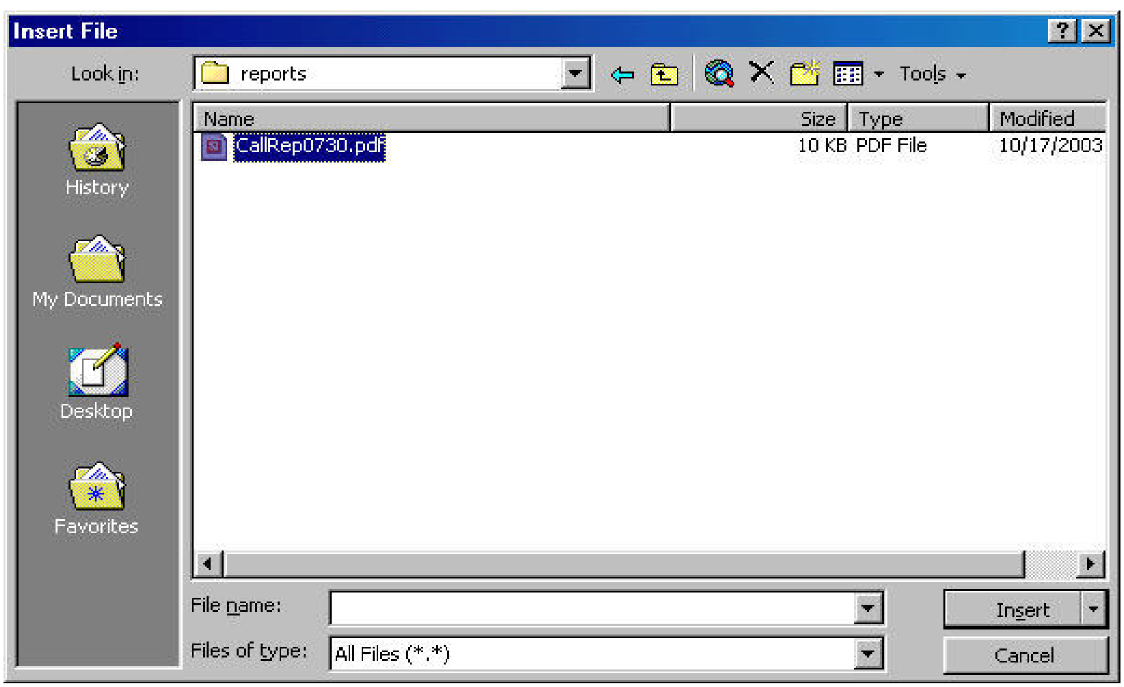
The new STS gives you the option of printing any report to a file. Once the report is printed to a file it is very easy to attach it to an email.

1. Choose the report you would like to print.
2. Once the report is on the screen, click the Printer icon at the top left of the screen.
3. When the Printer dialog appears (screen above) click the Print to File box.
4. Click the down arrow to the right of the Type: field and choose RTF or PDF. RTF allows the file to be opened with Microsoft Word. **PDF is the Adobe Acrobat format. This format actually offers a more accurate representation of the report**. This format should be used if the recipient of the report has the Acrobat reader installed (most newer computers do).
5. The path (C:\sts\reports\) should already be in the Where: field. At the end of the path type in the file name for the report. The name should briefly describe what information is in the file and the time period. See the example above. CALLREP0730.pdf. This is a sales call report ending the week of July 30th. If you were printing a Month End Report for July you might name it MONTHEND07.PDF. The naming is important to help the person receiving the report quickly understand what may be in the file. **If you chose PDF as the file format you would name the report file MONTHEND07.PDF.**
6. Finally, click the OK button to generate the report.

In the example above you would find a file named CALLREPORT.PDF in the C:\STS\REPORTS folder. See the following page for instructions on attaching the file to an email.

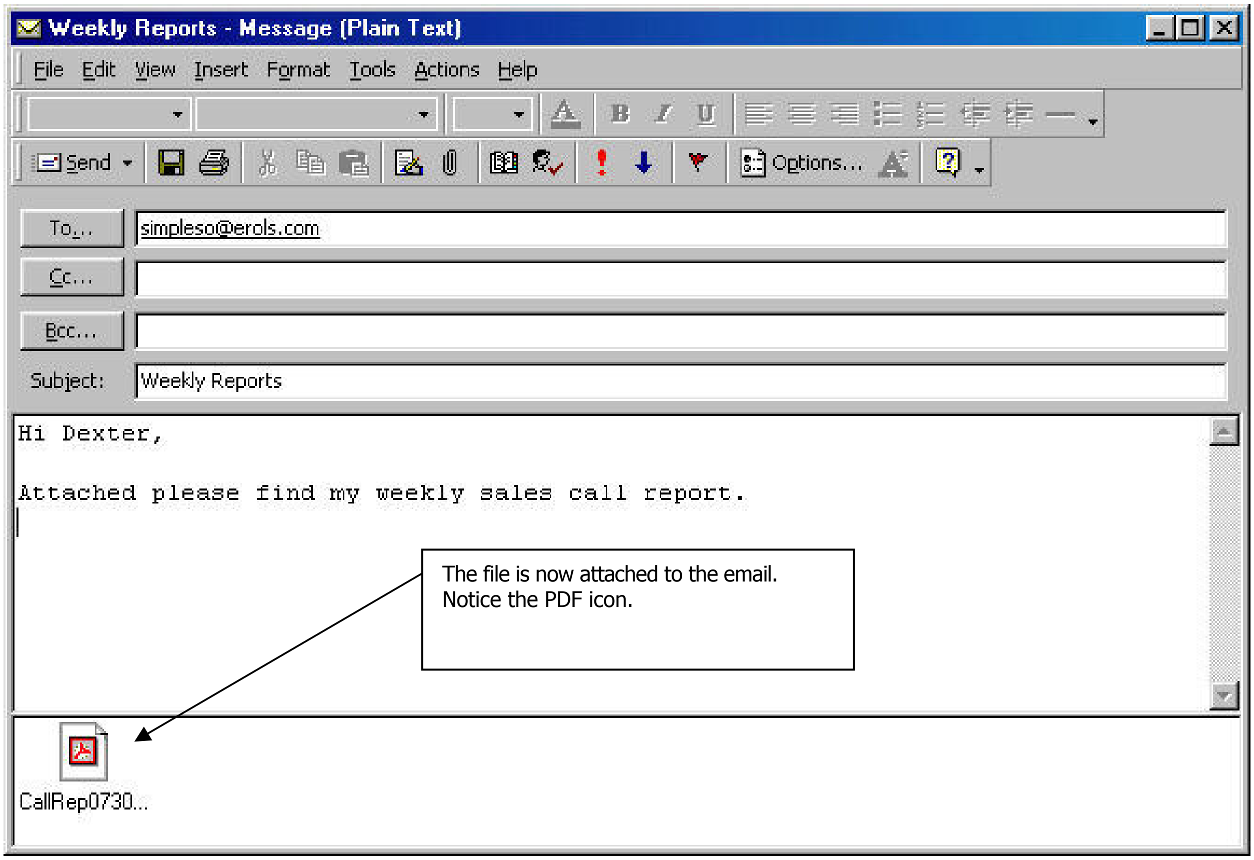
Reports – Attaching A File To An Email





Double click on the report you would like to insert into the email.

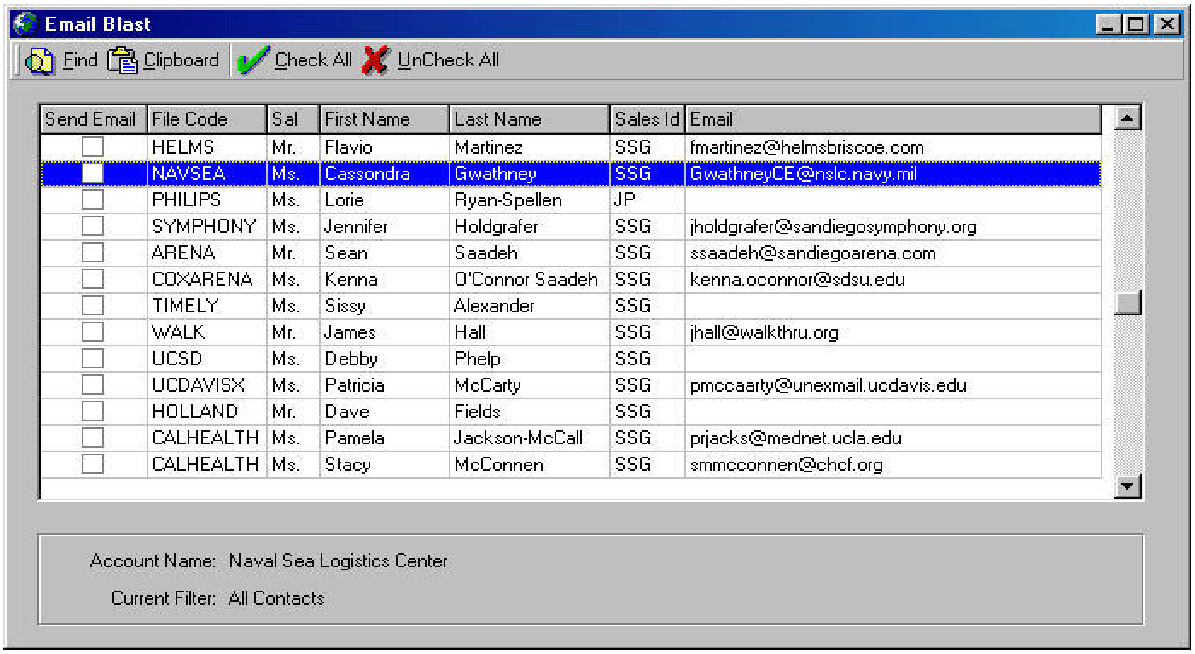
Reports – Attaching A File To An Email



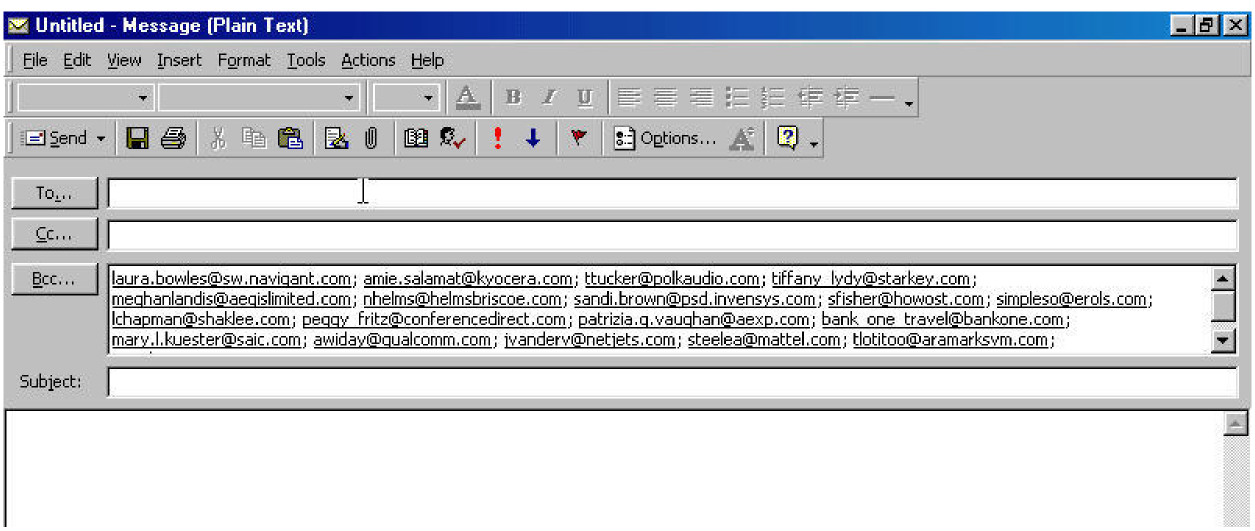
You can repeat the process and attach as many reports as needed before “sending” the email.

EMAIL BLAST

The Email Blast screen allows you to bulk email a large number of contacts.



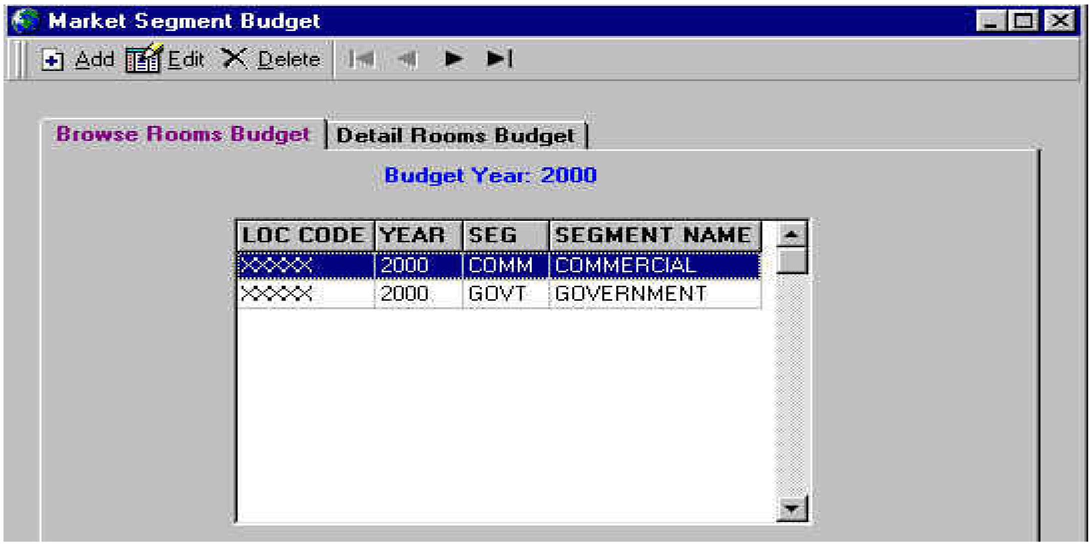
Click the Find button to set the filter. Once the filter is set you can double click on contacts to check them individually or click Check All to check all contacts that have an email address listed. Click the Clipboard button to copy all of the checked contacts to the Windows Clipboard. You are now ready to start your email program.



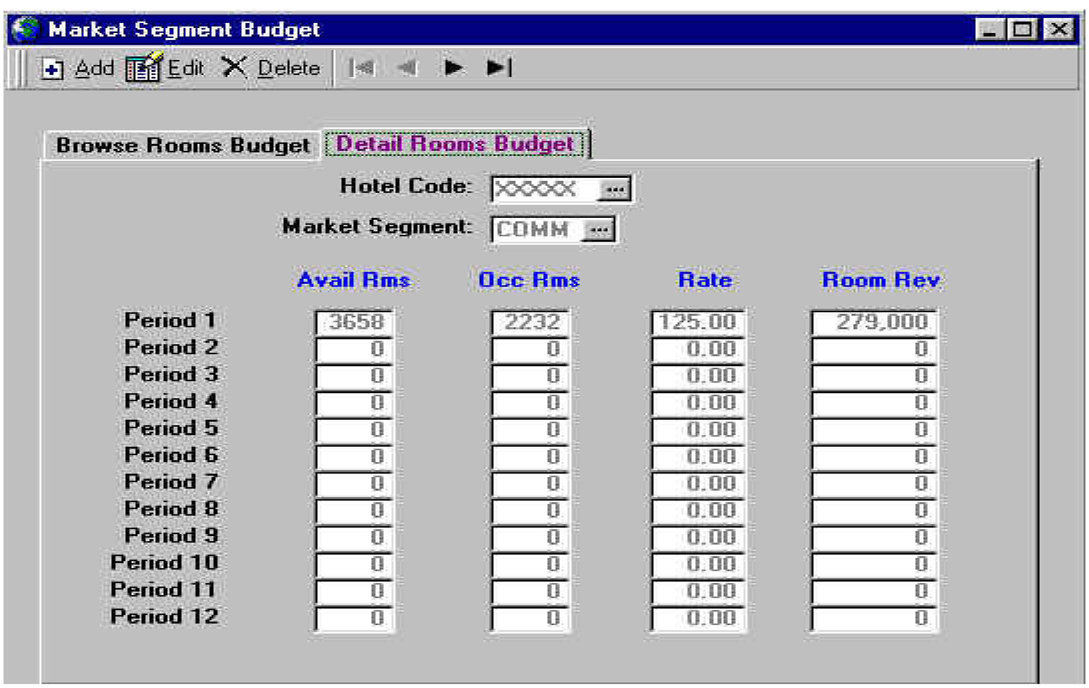
You want to paste the email addresses into the BCC (Blind Carbon Copy) field. This will prevent each recepient from seeing the other contacts you have emailed. Right click over the BCC field and choose Paste to paste the email addresses. Finish your email and click Send. This process should work with any email program that has a BCC field available.

BUDGET-ROOMS

The Budget module allows you to enter your rooms budget information by month, by market segment. This information is then included in reports, such as the Month-End Report. If you do not create your budget by market segment, you may enter the entire hotel's budget under one segment such as Corporate. Choose Budget | Add/Edit from the Main Menu. After entering the budget year to work with, you will be presented with a screen listing any existing entries.



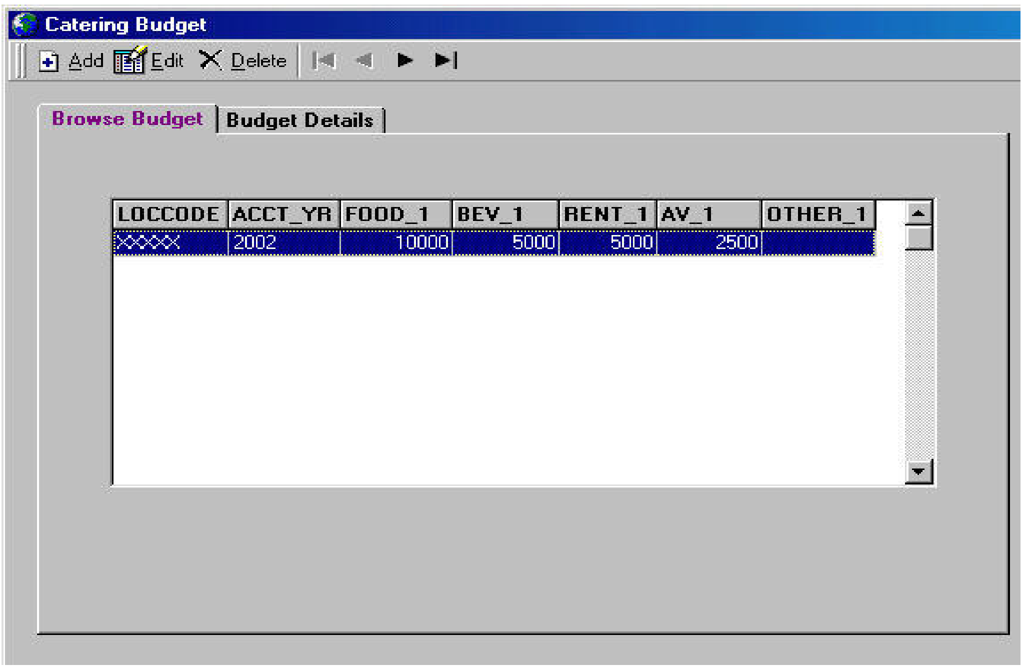
Click the Add button to add a new entry or edit to modify or update an existing entry.



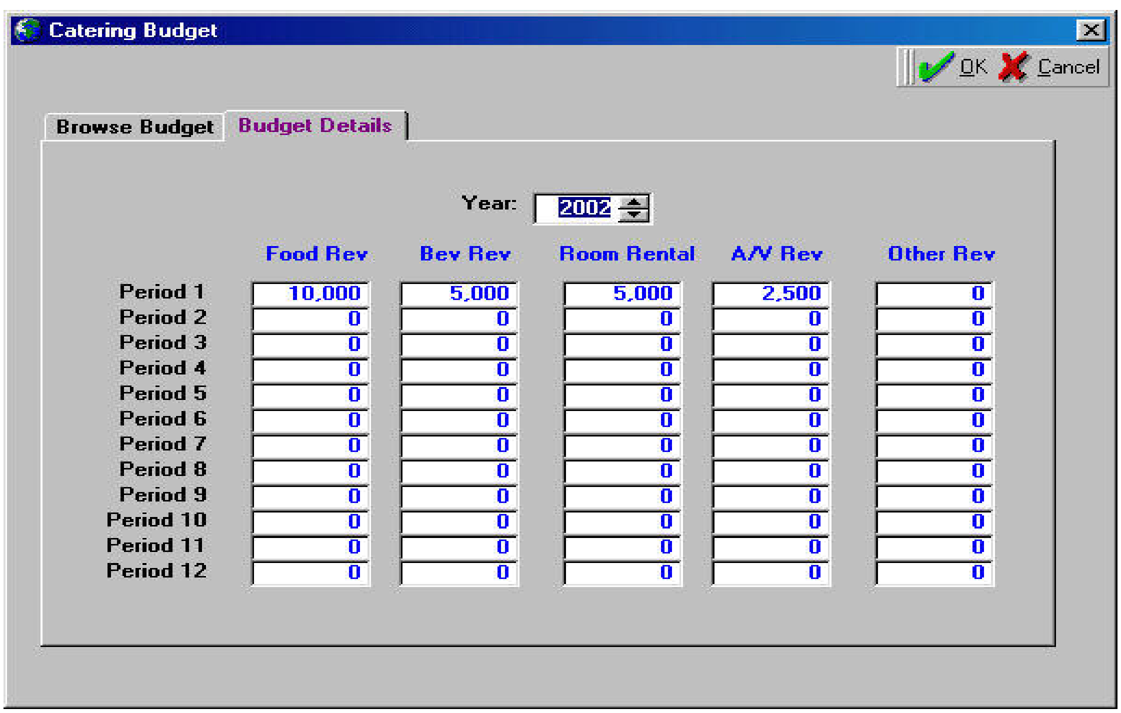
Enter the requested information in the appropriate fields. Click OK to save changes.

BUDGET-Catering

The Catering Budget module allows you to enter your catering revenue budget information by month. This information is then included in reports, such as the Catering Annual Revenue By Month Report. Choose **Budget | Catering Budget** from the Main Menu. Enter the Year you would like to enter budget information for. You will be presented with a screen listing any existing entries.



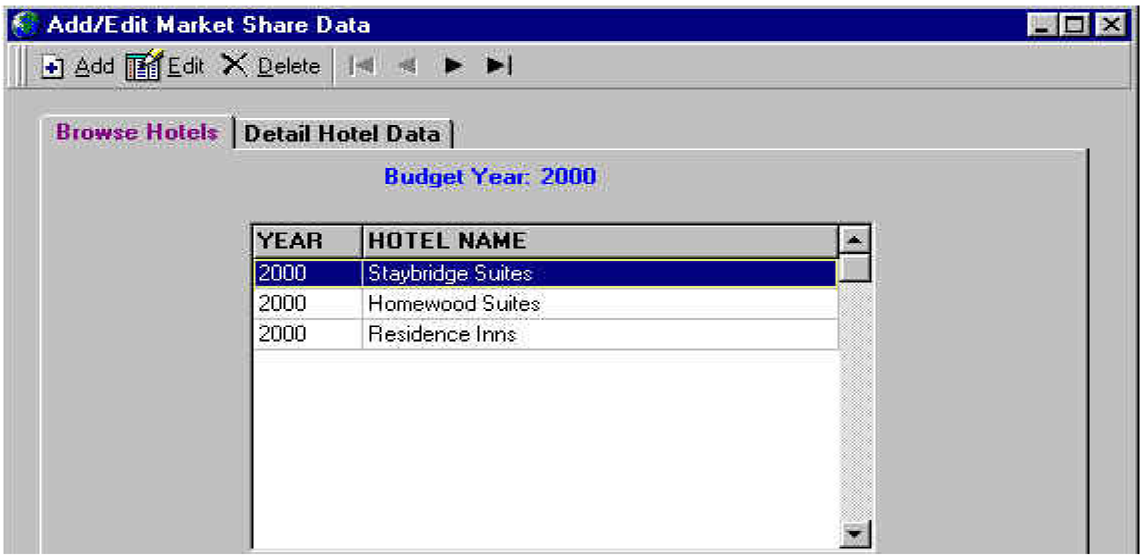
Click the Add button to add budget information for a new year.



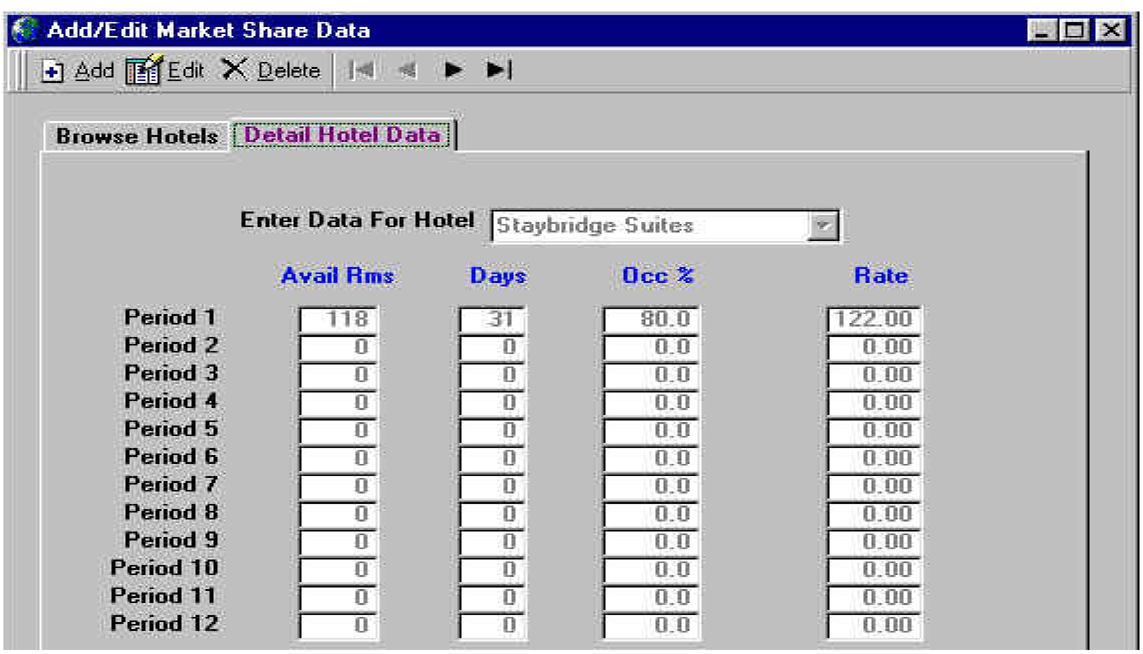
MARKET SHARE

The Market Share module allows you to enter the actual rooms, rate and revenue for your hotel and your competitors. Once the information is entered you may print the Market Share Report which will calculate Fair and Actual Market Share for your hotel and your competitors.

Choose Budget | Market Share from the Main Menu. After entering the year to work with, you will be presented with a screen listing any existing hotels. Click ADD to enter a new hotel or EDIT to enter the current months statistics.



Click the Add button to add a new entry or edit to modify or update an existing entry.



Enter the requested information in the appropriate fields. Click OK to save changes.

UTILITIES

Functions in the Utilities Section allow the user or installer to set up certain system parameters for running the program (specific to your location), to make the system compatible with your hardware, to input entries for "validated fields", to change passwords, etc. Many of the functions will be completed during the initial installation, but it may be necessary to change certain items at a later date; consequently, the user may have to access these operations.

About

This “About” Screen displays STS version number and licensed to information.

Backup Data

It is strongly recommended that you perform a system backup minimally three times per week. Ensure that you have diskettes ready on which to run the backup when choosing this function. Do not use the same diskette each time, but rather have three diskettes labeled for the individual days of the week (e.g. Monday backup, Wednesday backup, Friday backup). Replace your backup disks with new ones every 3-4 months.

Index Files

This function catalogs the data in the system for quicker access. Although there is no set schedule, minimally, you should index files if you reboot in the middle of an operation.

Table Maintenance

The system uses "validated fields" to track important data. In these fields, the software tests your input to see if it matches the list of approved answers ***you have set up in advance***.

Most of this information must be entered during the initial installation such as your salespersons, user passwords, etc. At a later date, the user would access this section to add a new salesperson's "id", add parent companies, among others.

Click on **Utilities** from the main menu bar. From the submenu, click on **Table Maintenance**, then you may click on the final option from the cascading menu (e.g. salespersons). To *add new entries* from this screen, simply click on the ADD key to retrieve the input screen. After completing the input fields, *click "OK” to save the entry*.

From the scrolling screen listing any entries that have been added, you may also edit/delete previous entries. Click on the entry you wish to alter, then click "Edit". When the information is retrieved to the screen, simply type over or add any changes. *Click "OK" to save changes*.

Market Segments: Enter code (one to two letters/numbers) and description (e.g. P for Preferred) and indicate if this segment is a group or individual segment.

Salespersons: Enter "ids" (generally salesperson's initials), names and titles.

Parent Companies: (Optional) This four letter code is used if there are several departments under a major account that you wish to track separately. (e.g. Toyota (Parent Code=TOYO) may have several divisions staying with you. Toyota Sales would have a unique corp. number/id on the **Add Account screen** but you may include TOYO under Parent Code on the same screen. The benefit of this feature is to track/report out total activity for the entire account not only by the individual subdivisions.

Competitors: If utilizing the Market Share features of the system, you would enter your competitors' **plus** your hotel's information under this option. Enter hotel name, total rooms available to sell, and answer Y/N whether the hotel is your hotel. Report order controls the order in which hotels are printed on reports.

Trace Codes: The trace system is designed as a "tickler file" for *future* action. Examples of codes may be *THK* for *thank you*, *FU* for *follow-up*, *DEP* for *deposit due*.

Sales Call Codes: These record *past* action. Examples may include *CC* for *cold call*, *CV* for *client visit*, among others. You may add a monthly goal corresponding to each sales call type.

Sales Call Goals: You may also add a monthly goal corresponding to each salesperson.

Lost Business Codes: Lost business "reason" codes may include: not enough meeting space, not enough rooms available, rate too high, among others.

Travel Profile Codes: Codes to identify Travel Profiles.

Reservation Method Codes: Codes may include: rooming list, individual, etc.

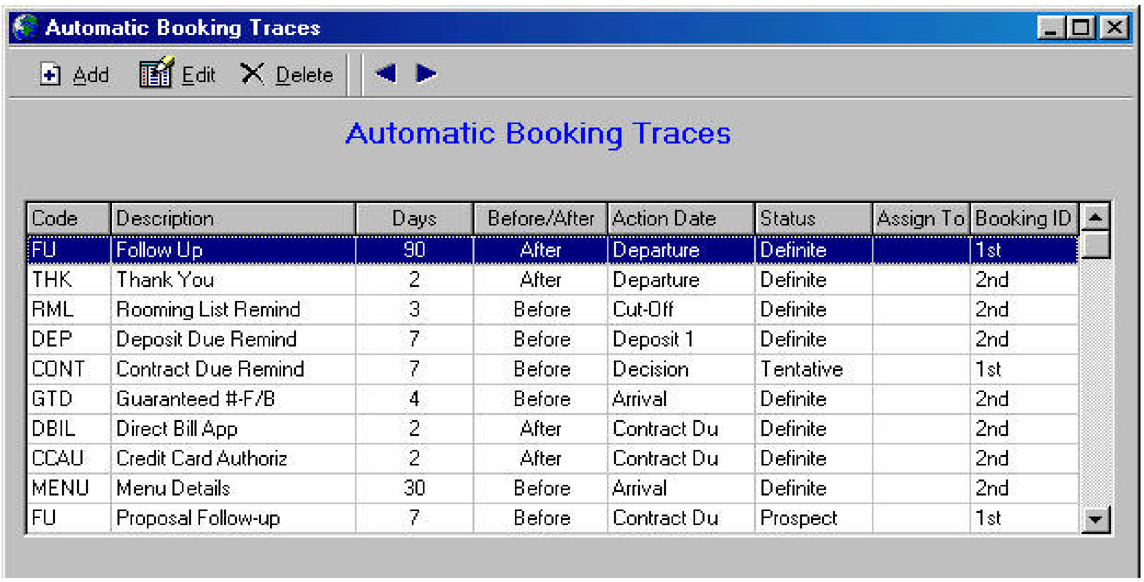
Group Business Origin Codes: Codes may include: central reservations, cold call, rebook, hotel to hotel, among others.

Automatic Booking Traces: Generally, with a group booking, there are several things that typically occur, e.g. send a cut-off reminder, send thank you immediately after stay, etc. The system will allow you to enter these as automatic "traces". Once added here, every time a group booking is added, a screen listing these automatic traces will pop up. You may then modify and/or delete each trace as it applies to the specific group.

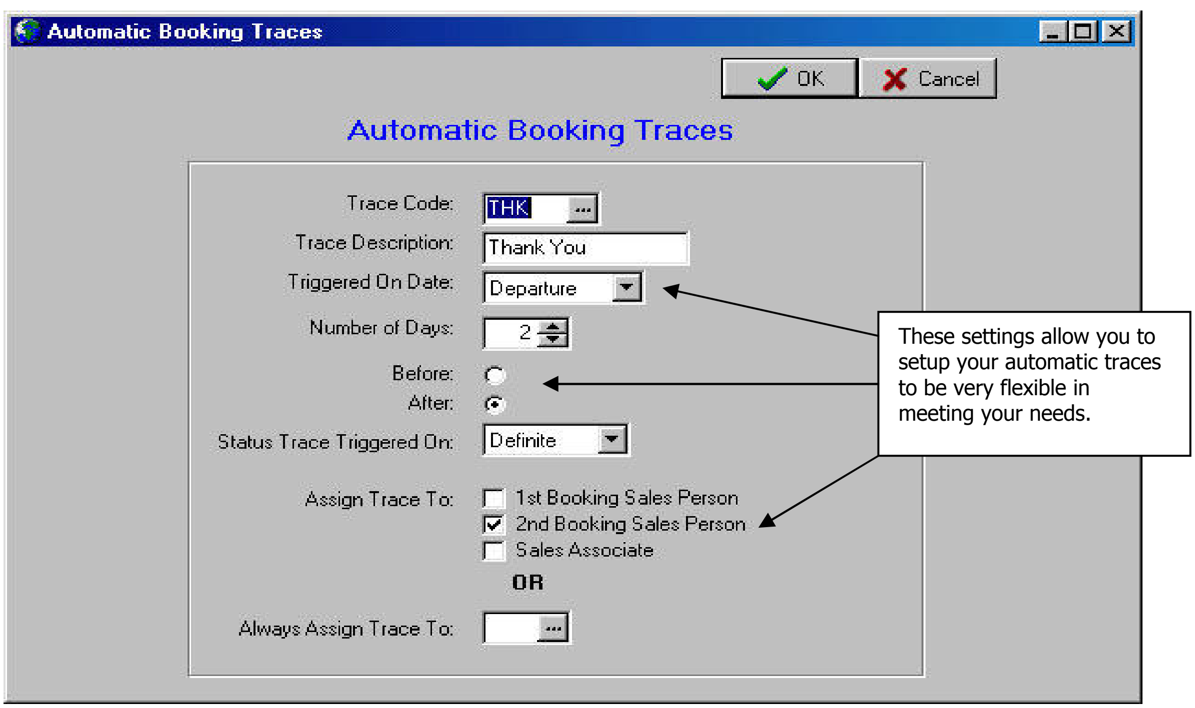
On the "Add a Booking" screen, the user is prompted for "Decision Date", "Cut-off Date", "Booked Date" and "Arrival/Departure Dates". Here, you may determine when the automatic traces will be triggered in relation to these dates. Remember, the trace codes must have already been entered under Utilities/Table Maintenance/Trace Codes.

Automatic Booking Traces: Generally, with a group booking, there are several things that typically occur, e.g. send a cut-off reminder, send thank you immediately after stay, etc. The system will allow you to enter these as automatic "traces". Once added here, every time a group booking is added, a screen listing these automatic traces will pop up. You can control when traces pop up depending on the Status of the booking (Prospect, Tentative or Definite). You may then modify and/or delete each trace as it applies to the specific group.

On the "Add a Booking" screen, the user is prompted for "Decision Date", "Cut-off Date", "Booked Date" and "Arrival/Departure Dates". Here, you may determine when the automatic traces will be triggered in relation to these dates. Remember, the trace codes must have already been entered under Utilities/Table Maintenance/Trace Codes.



Code	Description	Days	Before/After	Action Date	Status	Assign To	Booking ID
FU	Follow Up	90	After	Departure	Definite		1st
THK	Thank You	2	After	Departure	Definite		2nd
RML	Rooming List Remind	3	Before	Cut-Off	Definite		2nd
DEP	Deposit Due Remind	7	Before	Deposit 1	Definite		2nd
CONT	Contract Due Remind	7	Before	Decision	Tentative		1st
GTD	Guaranteed #-F/B	4	Before	Arrival	Definite		2nd
DBIL	Direct Bill App	2	After	Contract Du	Definite		2nd
CCAU	Credit Card Authoriz	2	After	Contract Du	Definite		2nd
MENU	Menu Details	30	Before	Arrival	Definite		2nd
FU	Proposal Follow-up	7	Before	Contract Du	Prospect		1st



User Field 1, 2, 3, 4, 5: These fields allow the user to determine, if desired, alternate ways of categorizing accounts. *(Note: For Corporate Staybridge Suites hotels, "user fields 1-5" have already been predefined and pre-coded for you.)*

Examples of additional tracking fields may include:
- *Color coding*, you may track an account as *red* for a "hot" account, etc.
- *Coding "by decision"*, you may include codes like *price*, *location*, etc.

If you wish to utilize these fields, you would first replace the generic description, e.g. "user field 2" with a more detailed description "Geographic Codes" under Utilities/Program Configuration. Next, under this option (Utilities/Table Maintenance) you would build the actual databases. Using the same example, "Geographic Codes", you may add a database to include *SW for southwest*, *NE for northeast, SE for southeast and NW for Northwest*. You may later generate *more specific* lists, mail merge files, etc. for your accounts based on this criteria.

Add/Change Users: Authorized users may add the names and "log-in" passwords of others authorized to enter the system.

Change Validated Fields

This function should rarely be accessed. It allows you to change a file code, a corp. no., a market segment, a salesperson's "id", or a user field so that all appropriate data files will be automatically modified. For example, you would select this option if you replace a salesperson and turn over all the files to a new salesperson. Note: All transactions will be transferred to the new salesperson. (Remember to first add the new salesperson's "id" under Utilities/Table Maintenance.)

Refresh Files

This option will update contact data files with new codes that may have been added on the account screen.

Configure Hotel Info

This option allows the user to add hotel-specific information such as location number, hotel name/address, rooms available (total # of rooms in hotel) and the five room types (e.g. KNG, XPER, etc.) that will appear on the **Add An Account** screen. There are also tabs for Program Config (re-labeling the user fields), Published Rates for the hotel and setting up Seasons (if applicable).

Build Accounting Calendar

When the system is first installed and at the beginning of each new year, the accounting calendar should be added for at least 1 - 2 subsequent years. Reminder, accounting calendar may not match actual calendar so it is very important to ensure that the dates (input) are accurate. To move forward in the cells, use the Tab key. To move backwards, press Shift + Tab. Remember to click on "OK" to save input.

Inventory Functions

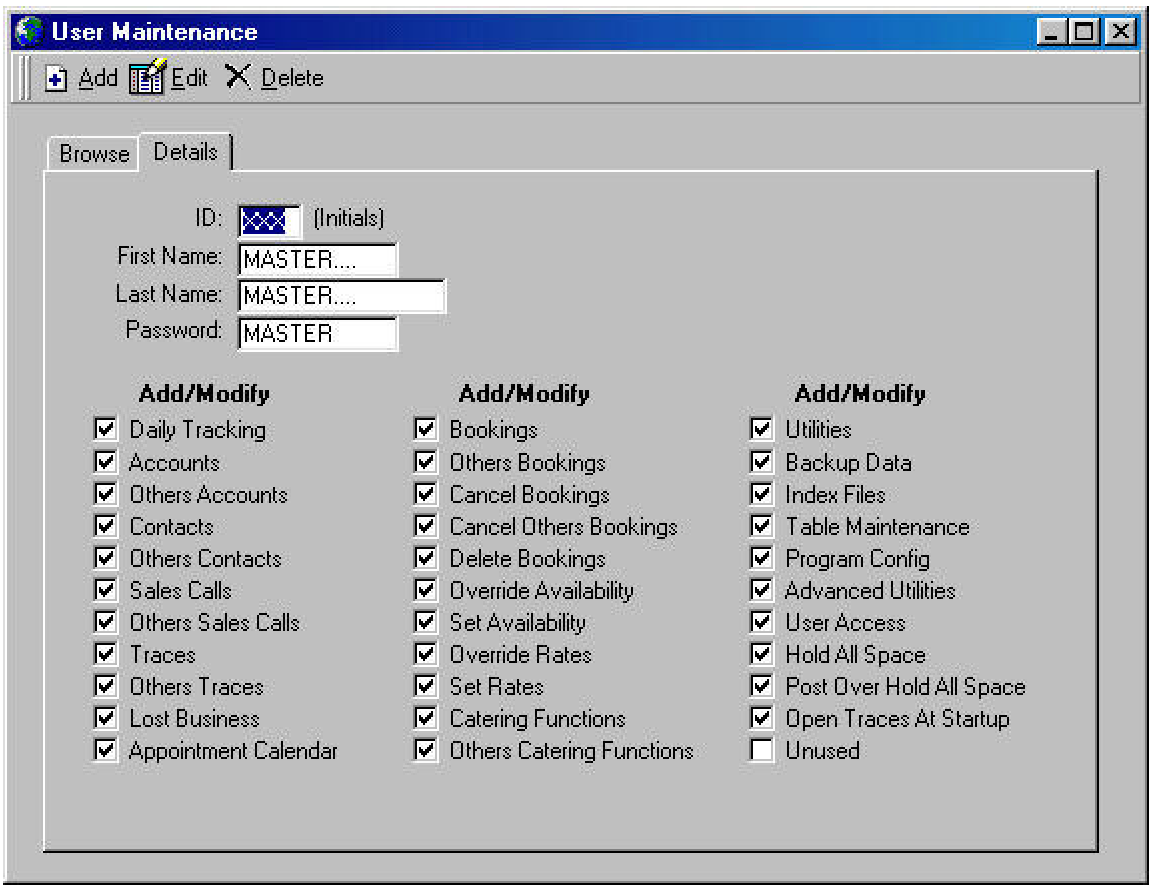
Create (Modify) Group Room Allotment: First, you must create your general room allocation (singles and doubles) for the entire year…enter beginning date 1/1/XX and ending date 12/31/xx. This is the number of group rooms that can be sold per day by the sales office. Once the entire year is entered, you may then target specific ranges of dates to modify, zero (0) group rooms on New Year's Eve, etc. Ensure that you are updating the *day(s) of the week* that correspond to the *date(s)* entered. The numbers may be updated as often as you like. These numbers are very important when viewing your Group Rooms Control Log (GRC) to determine rooms available to sell.

Create Target Rates: This screen allows you to create a schedule of target rates that will be displayed on the Browse GRC screen. The rates are based on the % of group rooms booked against the rooms allocation you created in the Group Room Allotment screen. The higher number of rooms sold from the allocation, for a particular day, the higher the suggested rate.

If you do not need to setup 4 tiers and would like to have one set of rates, you may enter 100% in the first tier (Rate A). Doing so will force STS to always display the rate for that date regardless of how much of your inventory has been blocked.

USER MAINTENANCE

The User Maintenance screen allows you to add password access to STS. You can add a Personal password for yourself or anyone else who should have access to the STS functions through Main Menu | Utilities | Table Maintenance | User Maintenance. Once there, you can click ADD to enter a new user. The Password field can be up to 8 letters/numbers. Check marks give the user access to that part of STS. Removing the check mark will deny that user access to that part of the program. Ensure you have **at least one user** who has access to Utilities, Table Maintenance and User Access.



Most of the Advance Utilities options should only be used with help from Simple Solutions. Below are some of the Advanced Utilities functions that may prove helpful.

Purge Temporary Merge Files

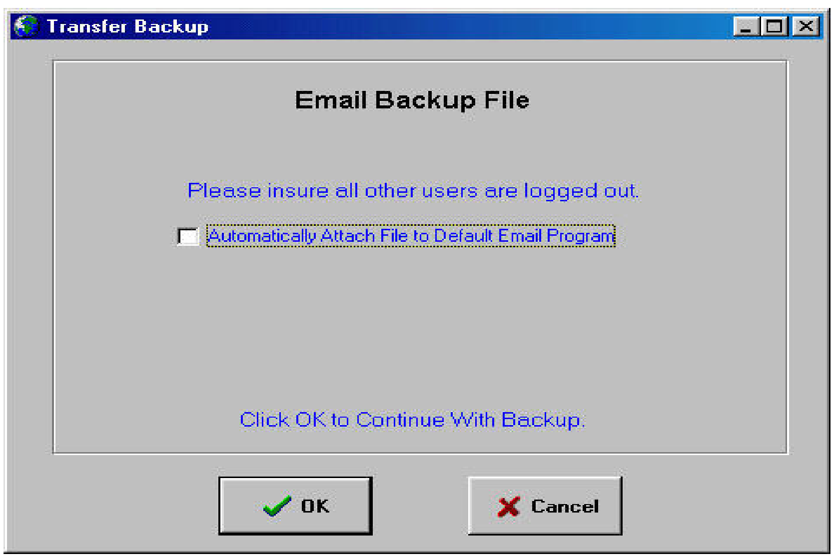
When merging Contracts or BEOs, STS creates temporary files that are used by Microsoft Word to perform the merge process. These files are named after the Event Number of the booking being merged. An example would if you were merging with booking number 115, several files would be created during the merging process (115.con, 115.mer, 115.tab…). These files are not automatically deleted after the merging process. The Purge Temporary Merge Files function will delete any files that begin with a number including these temporary merge files. **This function should be run at least monthly.**

Un-Delete Account

Deleting an Account will delete all Contacts, Sales Calls and Traces related to that account. If you delete an account in error the Un-Delete Account will quickly un-delete the account and related information.

Email Backup

The Email Backup option allows you to attach a complete backup to an email and send it to another STS user. This option would typically be used in one of two situations. Simple Solutions asks you to send a backup to it's office for review or you may have a regional or corporate support person who would like you to send them a copy of your data. Once again, the recipient must have STS installed on their system to use the backup.

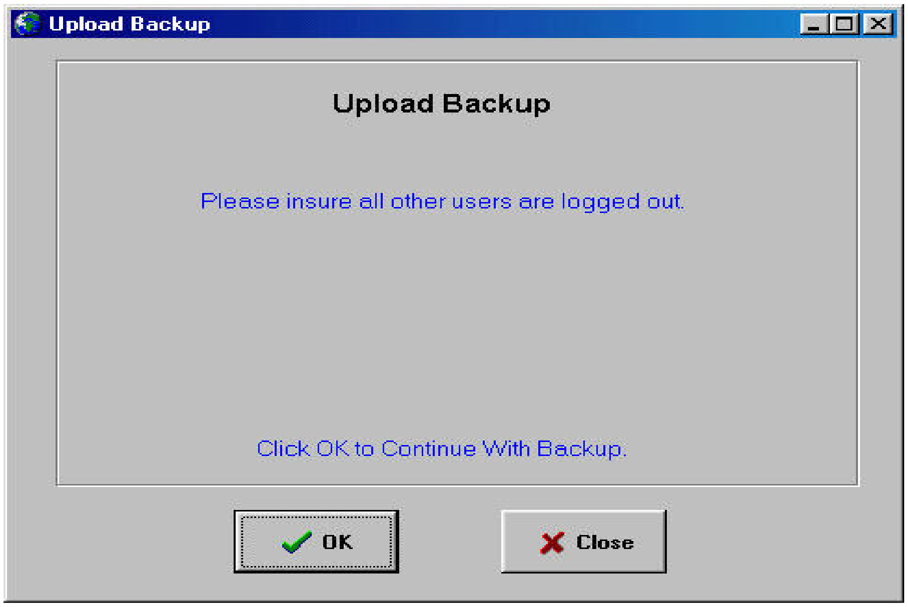


After clicking the OK button a backup of the data files will be created on the server computer in the \STS\DATA\BACKUP folder. An example of the file name is SHVBC08162001.ZIP. The first 5 letters is your property code (located on the Config Hotel Information screen under Utilities) and then the date of the backup with a file extension of .ZIP. Placing a check mark in the "Automatically Attach File to Default Email Program" will start your default email program and attach the backup file to the email. If your default email program is not the program you use to send email you would not check this box and manually attach the file to an email after the file is created.

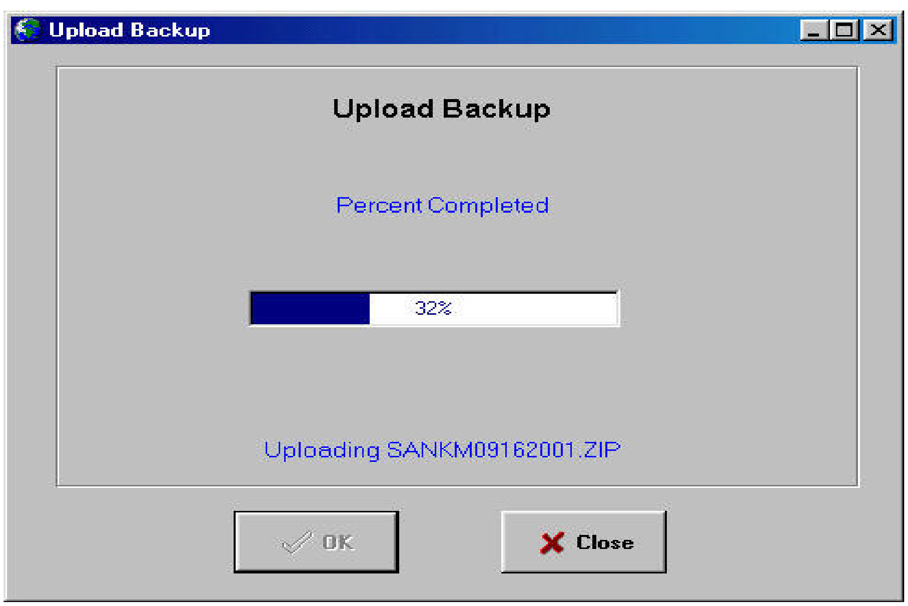
Upload Backup

The Upload Backup function was created in response to requests for the ability to automatically transfer a copy of your data backup to a corporate web site. This would allow the secure storage of your data while also providing other authorized personnel in your company to access the information if needed. This function utilizes an internet connection to transfer the backup. If your Upload Backup option is greyed out it means your system has not been configured to utilize this function. You will need to contact Simple Solutions to discuss properly configuring your system.

You must connect to the internet before using this function.



Click OK to begin the process. Your files will be backed up first.



Once the backup is complete the transfer will begin. When the tranfer is complete, click the Close button.

EXIT

This option allows you to exit STS. Click on Quit from the main menu bar, then click on Quit a second time from the cascading menu.