AutoClerk User Guide Version 9
Glossary

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AutoClerk User Guide Version 9

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Glossary

The following glossary contains terms and definitions commonly used in AutoClerk Version 9.

Using the File Tree Feature

If you have a difficult time finding a command or feature, use the File Tree feature. This can be useful if a keyword appears in more than one menu or command in AutoClerk. For example, the word Advance might appears in several places. The file tree high-lights each instance of the word from the top of the list. You can decide which one is appropriate and determine the location of this feature by following the path of the tree.

1. On the AutoClerk Main menu Tool bar, click on View.

2. Select Menu Tree feature from the View menu.

3. Enter a phrase or keyword in the empty box at the top of the file tree. As you enter letters into the box, partial results are high-lighted in the file tree located under the Search box.
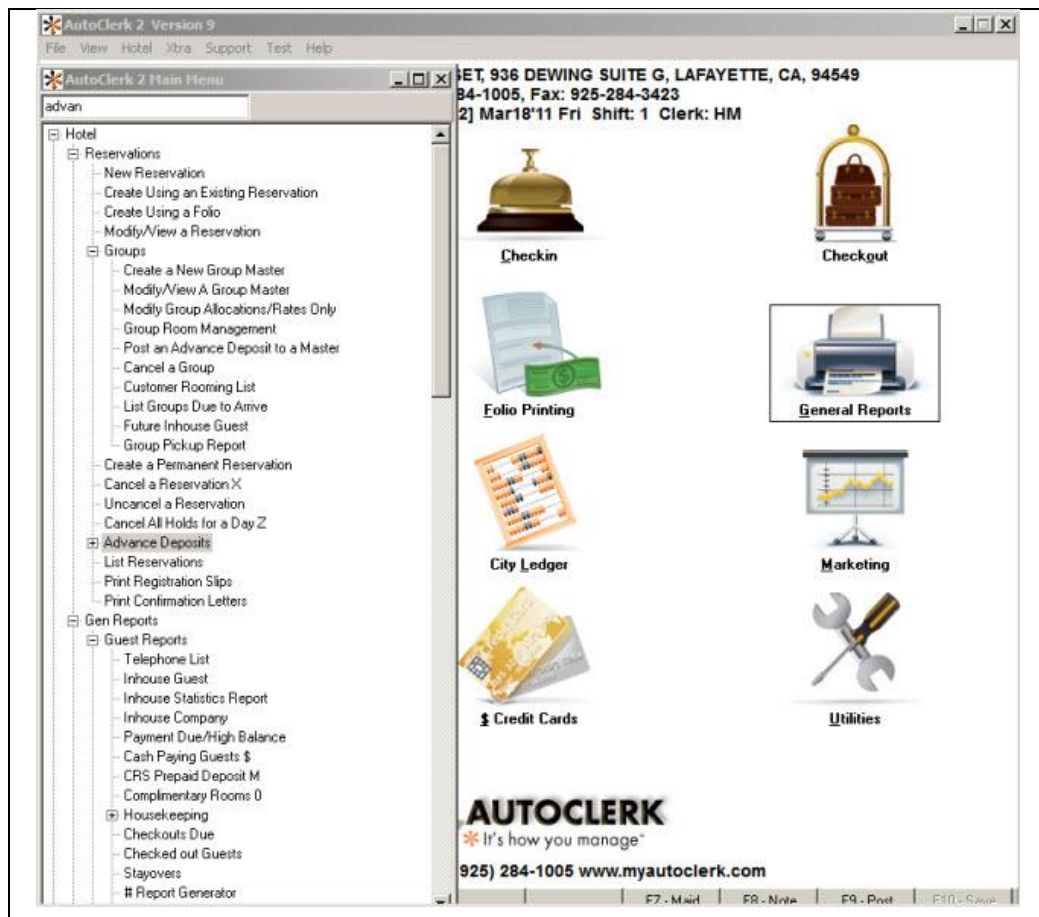
Figure 1: File Tree Search Box

Administrative Extension Report

The Administrative Extension allows you to generate a report of phone calls made from non-guest rooms. For example, conference rooms or the sales office. You can generate this report only if you have purchased the Call Accounting interface. Contact AutoClerk Support in order to use this feature: (925) 284-1005, Option 1.

All Notes

In the General Reports area, this feature allows you to view the text of all large notes on reservations, inhouse guests, City Ledger accounts and/or Concierge notes.

Arrivals File

In the Utilities → Guestware area. This is only used when the Guestware or other CRM is installed. Contact AutoClerk Support in order to use this feature: (925) 284-1005, Option 1.

Availability Report

In the General Reports area, you can use this to generate a report filtered by date ranges rates, and types of guests or rooms available in that date range.

BackUps

In the Functions area, this command allows the AutoClerk program to perform a backup of the AutoClerk data at each shift change and during the Night Audit. A copy of the backup is stored on the hard drive of the AutoClerk server and an additional copy is stored on the hard drive of Station 1.

Bank Deposit

In the General Reports area, this report provides bank deposit details, and it is for the current day only. This report displays a grid of each pay type and each ledger. It shows how much of each pay type was posted to each ledger. Clerk totals are displayed at the bottom of the report.

Bank Deposit

In the General Reports area, Past Transaction reports, this report displays a grid of each pay type and each ledger. It shows how much of each pay type was posted to each ledger. Clerk totals are displayed at the bottom of the report. This report is for a date before the current date.

Block Rooms

In the General Reports area, use this function to assign rooms to reservations.

Call Accounting Report

Call Accounting posts phone calls made from a guest room to the guest's bill. You can generate this report only if you have purchased the Call Accounting interface. Contact AutoClerk Support in order to use this feature: (925) 284-1005, Option 1.

Check Out

The Checkout area, allows you to check out a guest when a guest departs and pays the balance on their bill to $0.

Check-In a Walk-In

The Check-In area, you can use this to check in a guest who does not have a reservation and needs a room. You do not need to create a reservation prior to checking in a walkin.

Checkin Walkin or Reservation

Note: When you check in a walk in, specifically, make sure to check the F4 availability before you select a room.

Check-In

The Check-In area, you can checkin a walkin or a guest with a reservation. You can also check in guests from other areas in AutoClerk.

Checklist

In the General Reports area, under Forms, you can print out the Checklist. This is a blank Housekeeping Report. One use is for Maintenance to use it as a punch list.

Checkouts Due Report

In the General Reports area, use this to generate a list of view checkouts dues for a date range you specify.

Checkouts File

Found in the Utilities →Guestware area. This is only used when the Guestware or other CRM interface is installed. Please contact AutoClerk Support in order to use this feature: (925) 284-1005, Option 1.

Choosing Suitable Backup Keys and Performing Backups

In ACAdmin, a key must be between 12 and 16 characters. Follow Best Practices when choosing and managing keys.

Chronological Detail

In the General Reports area, Past Transaction reports, this report displays a chronological listing of transaction posted. All of these transactions are sorted by the order in which they took place.

Chronological Detail

In the General Reports area, use this to view only the chronological details related to monies.

City Ledger

City Ledger is an area where you keep track of the companies which you bill for payment. This is also known as Direct Bill or Accounts receivable.

Clean, Vacant, Not Reserved: White Cells

In the Tape Chart, white cells represent rooms which are, vacant, and not reserved.

Clerk Passwords

Those with the proper permission levels can reset clerk passwords in ACAdmin. Neither the AutoClerk PMS nor AutoClerk, Inc., stores user passwords.

Clerk Set Up

The Clerk Setup button is on the ACAdmin Home page. The Clerk Setup window contains all of the property's AutoClerk PMS and ACAdmin users. Each user record consists of a clerk ID, clerk name, initials, level, a list of groups for which the user is a member, and finally a password.

Complimentary Rooms Report

In the General Reports area, this report allows you to view any rooms that are inhouse on a complimentary basis, for example, rooms provided to those in the hotel industry.

Compressed Room Chart

In the General Reports area, you can use this to generate report in which Room numbers, last names of guests, and the dates of their stay appear in this report window. Abbreviations are as follows: C is checked in, R is reserved, and O is out-of-order.

Confirmation Letters

In the Reservations area, you can print these letters to send to a guest in order to confirm the guest's reservation. (You set up these letters in the Utilities area.)

Creating a New User

To create a new user in ACAdmin, go to the Clerk Setup window, and click on the Add button.

Credit Card Key

In ACAdmin, on the Reset Encryption Keys window, you can set and reset various encryption and login keys used by the AutoClerk PMS and its interfaces. The cckey is listed with the expiration date of the current key.

Credit Cards

Credit Cards is a feature area in AutoClerk that allows you to manage activities related to credit card payments and authorizations.

CRS Type Pull Down

This field auto fills if a reservation comes into AutoClerk via a Centralized Reservation Service (CRS), such as Best Western.

Current Reservations

In the Utilities→Mailing Lists→Current Reservations, you can name the file. AutoClerk saves the file to export_clerkid\t1\. Then, when you click the Save button, your data is saved as a text file. Contact AutoClerk support, if you have a problem locating saved files: (925) 284-1005, Option 1.

Customer Rooming List

In Reservations→Groups, you can access the customer room list the Reservation Confirmation letter, which contains all of the details related to the guest's in that group.

Daily Cash Report (DCR)

In the Utilities area, use this function to generate a Daily, Month-to-Date (MTD) and Year-to-Date (YTD) information.

Day Tiered Rates Pull-Down Menu

In the Check In or Reservations areas, when you select the arrival and departure dates, if a stay extends over a weekend, for example, the weekday and weekend rates appear in these fields. You can modify any day's rates by clicking on the drop-down menu and adjusting the rate in the Quoted cell.

Default Passwords Required for Initial Use

When ACAdmin is first installed, AutoClerk gives the GM (or other key staff member) a default clerk ID and password for access to the application. This password is only usable once in order to access ACAdmin and setup all your users.

Defaults/Options

These are extra set up options in ACConfig you can enable with the help of the AutoClerk support team. You are not required to use these options.

Define Buildings

Use this is in ACConfig in conjunction with the Assigned Building/Floors ACConfig feature. You can set up the name of the buildings of your property. The names you choose appear in the drop-menu of the Assigned Building/Floors ACConfig feature.

Define Charge Payment Types

Please contact AutoClerk support before creating any payment types or charge types: (925) 284-1005, Option 1.

AutoClerk support can help you define payment and charge types in ACConfig as well as map these payments and charge types per interface. Do not attempt to do this for the first time without an AutoClerk Support representative.

Note: The Setup Credit Card Mapping Types form pulls the information you enter into the Credit Card Map Types fields on the Define Non-City Ledger Transaction Types window.

Define Room Features

Use this function in ACConfig to specify certain unique features to a room. Every room amenity is not a feature. Features are unique. For example, a TV in every room is not a feature. A huge flat screen in a Presidential suite is a feature.

Define Room Types

Use this in ACConfig to setup your room types, for example, QN for queen non-smoking rooms.

Define TA Commission

Use this feature in ACConfig to define the commission percentage your property pays to those travel agents who book directly with your property as well as any CRS (Central Reservation System) or GDS (Global Distribution System).

Delete a Customer

Deleting a customer in City Ledger allows you to remove a direct bill customer that no longer belongs in your city ledger.

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Delete Unused Records

In the Credit Card area, this feature is used only by AutoClerk support.

Departure Pull-Down Menu

In the Check In and Reservations areas, you can select a guest's departure date from a calendar, which appears when you click on the down arrow to the right of the Departure Date field. Or you can enter the number of days a guest wishes to stay, and AutoClerk automatically calculates the departure date.

Deposit Folio

Use this function if you needed to reprint a receipt (folio) for an advance deposit. Select Advance Deposits from the Reservations Main menu.

Deposits Due Report

In the Reservations →Advance Deposit, you can access this report of all deposits that are due to be paid by guests.

Detail for a Specific Transaction Type

In the General Reports area, use this to filter a transaction by clerk initials, shift number, or Rev or Non Rev. The report displays a specific transaction.

Detail for Specific Transaction Type

In the General Reports area, Past Transaction reports, this report displays, for example, all of the room charges posted yesterday, or all of the room charges posted on a certain shift, or all charges posted by a certain clerk.

Detail of Misc Posting—M3

In the Utilities area, use this report to view or print all of the miscellaneous posting you created during a date range you select. For example, a charge that has a label attached to it, such as Restaurant, appears in a charge category on reports. Misc is used for those transactions that require a charge type that does not exist in your configured system. For example, if a guest requests a bell boy to get a bag of pet food from the market, this charge would be entered as a miscellaneous charge, since there is no category that exists in the system for pet food.

Details Button

In the Reservations or Check In areas, clicking on the Details button opens a box in which you can enter additional guest contact data. The label of the Details button appears in red if there is enhanced contact details associated with a guest. The additional information varies depending on if you are entering Home, Company or Group contact information.

Discrepancy Report

In the General Reports area, use this report applies only if your property has the Phone Switch interface and housekeepers update the status of rooms from the rooms. For example, the housekeepers are required to press specific keys on the phone in each room as they complete the room's cleaning.

This reports discrepancies between what the housekeeper has entered versus the room's current status in AutoClerk. A housekeeper marks a room as vacant and clean. The front desk has not checked out the room; therefore, in AutoClerk the room's status remains occupied and dirty.

Edit Help Files

In ACConfig, use this to create or edit help text into the F1 Help screen, for example, the help screens you access while making a reservation. It allows managers to enter their own standard operating procedures.

Electronic Room Rack

In the General Reports area, use this to obtain a snapshot of the status of each room associated with your property. Use this feature to check guests into their rooms. If you right click on a room, you can access commands related to the major hotel tasks you need to perform in order to run your property. Note: The view displayed maps only to the current date.

Employees Forgetting Passwords

If a clerk forgets their Clerk ID and/or password, only someone onsite with access to ACAdmin and ACAdmin Administration group permissions can reset it. AutoClerk Support and Techs *cannot* reset passwords.

Encryption Key/Login Expiration Report

Generate this report to find out when your encryption keys and login information to AutoClerk expires.

Encryption Keys

In ACAdmin, on the Reset Encryption Keys window, you can set and reset various encryption and login keys used by the AutoClerk PMS and its interfaces.

Encryption key: An Encryption key tells a program how to encode data. Only someone who has the key is able to see (decode) the full data.

Enter Bank Deposit and Overage/Shortage

In the Utilities area, use this function to adjust your deposit if it has any overages or shortages. These changes are only reflected on the M2 report.

Esc

Escape allows you to leave the New Reservation form and not save any entries. If you want to save the changes, click No when prompted, Are you sure? If configured, selecting Denial is a way to track why a customer decides to deny making a reservation.

ETA Pull-Down

In Reservations→Groups, click on this menu, and select the estimated time of arrival (ETA) for a guest.

Existing Reservation

In the Reservations area, you can use this feature if you are making a reservation for a guest who wants to reserve more than one room. For example, two sisters traveling together might want to reserve a room for themselves as well as a room for their parents.

Export M2—Variable

In the Utilities area, use this feature to export the M2 report to a CSV (Comma Separated Variable) file, which you can import into Excel, as well as a .txt file (text file).

F10-Save

At the bottom of the screen, this button allows you to save all of the details you entered in the New Reservation form and creates the actual reservation.

Clicking on the F10 button when you are in any form will save the information you have entered and complete the task.

F1-Help

This button toggles on when you are in a different window, and if you click it, available help messages appear in a pop-up window.

F2-Guest

At the bottom of the screen, this button opens a Guest Lookup box. You can search for inhouse guests, guests who checked out today, or those who are due to arrive today. You can sort the columns by clicking on its header. You can also save a setup as your default.

By highlighting a guest and clicking on the 'More Info' button, you can see more information of the guest's stay such as the Form of Payment and Balance.

You can record guest phone messages through the Phone Msg button. (This is a property specific configurable option.)

F3-Room

This button allows you to select a clean room into which you can check an arriving guest. You can also associate room features with a guest's request in your search.

F4-Availability

At the bottom of the screen, this button opens a chart of projected availability for rooms. The default is to show the current day for the next 30 days along with the rates for the Rack rate class. You can change the start date, the rate class, number of guests and whether or not to view the rates and/or the property's Length of Stay (LOS) rules for that viewing. In addition, through ACConfig, you can change some of the defaults.

F6-Interfaces

At the bottom of the screen, this button lists installed interfaces.

F7-Maid

At the bottom of the screen, this button opens the room number and status of the room as related to housekeeping service. You can use this to manually update the status of your rooms, such as marking a room as clean, or putting a room out of order.

F8-Note

At the bottom of the screen, this button opens a note in which you can enter information associated with a City Ledger account. You can also use it to set up concierge notes such as the phone numbers for taxi services.

F9-Post

At the bottom of the screen, this button opens a form which allows you to post a charge from a list of possible charges to a room and a folio. For example, if two business travelers are sharing a room, a restaurant charge can be posted to the folio of one guest and not the other.

File

On the Reservation screen Main menu, File contains the Exit command.

First Name Field and Lookup

On the Reservation and Check In areas, enter the first name of the guest in this field. When you click on the Magnifying Glass icon, you can select the guest from a list of stored guest profiles. By entering the guest's last and first name, when you click on the Magnifying Glass icon, AutoClerk will narrow the search be starting with the first name. If a guest has stayed in the hotel before, selecting the guest's name from the Profile list, and clicking on the Copy/Ok button, automatically fills in the new reservation form with that guest's contact information.

Folio Information

In the Check In area, you can access folio information, which might contain guest contact information or length of stay.

Folio Printing

In the Folio Printing area, you can see that a folio is a guest receipt. AutoClerk provides you with style sheets, which allow you to format the folio or receipt with graphics, fonts, and verbiage specific to your hotel. AutoClerk style sheets provide you with a way to create logo-branded, more attractive hotel receipts for guests. Note when printing a folio, the room number and folio letter must belong to a guest who is checked in or who has checked out on the current day. Use Historical Folios to reprint folios for a guest who has checked out prior to the current day.

Folio

A folio is a receipt of bill for a guest. Guests can have their room charges broken out into different folios. The default folio is A.

Forcing a User to Change a Password

If management wants to force a user to change their password at the next login, someone in the ACAdmin Administration Group with permissions can reset a user's password.

Forecast

In the General Reports area, you can use this to generate a Forecast report of room statistics for a specified date range.

Function Buttons

The function buttons that run along the bottom of the screen, with the exception of Esc and F10, allow you to interrupt what you are working on and either get information or perform another task without losing what you are working on.

Function Keys

Use the function keys to interrupt any process in AutoClerk. For example, if you are in the middle of a checkin, and someone calls on the phone asking for a guest, you can press F3, and lookup a guest without losing the reservation information.

Future Inhouse Guest

In the Reservations→Groups area, you can access this report to view who is expected to be inhouse on a specific day. This is useful for researching Unused Group Rooms on the Forecast report.

General Manager Account and AC Administration Group

Once logged into ACAdmin for the first time, the GM creates his or her own ACAdmin user account.

General Reports

The General Reports area allows you to generate various types of reports available in AutoClerk.

Group Allocation Rates

In the Reservations→Groups area, you can access this feature to set the number of rooms and rate for a group staying at your hotel.

Group Master

In the Reservations→Groups area, you can access the master template or record you use each time you create a reservation for a member of a group of guests who want to stay at your property for an event, for example.

Group Pickup Report

In the Reservations→Groups area, this report gives you information on rooms picked up and revenue for groups past and future.

Group Room Management

In the Reservations→Groups area, you can use this function to add in group reservations, view reservations attached to the group, modify the group's allocation, and/or view group statistics such as how many rooms have been booked. You can add reservations either as a rooming list in a simple method, or on a call in basis and enter in more contact information for each reservation.

Groups Due to Arrive

In the Reservations→Groups area, Groups due to arrive includes groups not yet in the hotel, but anticipated to arrive at the hotel in the next 30 days (or a date range you select).

Groups

Groups are actual groups of people who are staying at your hotel based on an event, for example, a tour group, a bridal party, a medical conference.

GTD/Cancel Setup

This feature in ACConfig may not apply to your property. Please contact AutoClerk Support for additional information: (925) 284-1005, Option 1.

Gtd/Cxl Time Pull-Down

In the Reservation area, click on this menu to change the configured cancellation policy.

Gtd/Cxl Type Button

In the Reservation area, clicking on this button resets the form of guarantee and cancellation that is pre-configured based on the rate class and arrival date on the reservation.

Gtd/Cxl Type Pull-Down

In the Reservation area, clicking on this menu allows you to choose from a list of guarantee policies. However, when you enter the rate class and arrival date (above this menu), the form of guarantee and cancellation policy automatically changes to the configured settings.

Guest Email Setup

Use this in ACConfig to configure AutoClerk to send confirmation emails to guests.

Note: You need a network or computer vendor to configure this area. Additionally, you need to contact an AutoClerk representative to configure your confirmation letters. Please contact AutoClerk Support before using this feature: (925) 284-1005, Option 1.

Guest Folio Notes

In the General Reports area, this feature allows you to view the text of all Guest Folio Notes.

Guest Letters

The Guest Letter features allow you to create and modify confirmation letters. However, you must contact AutoClerk Support to use these features. Contact AutoClerk Support in order to use this feature: (925) 284-1005, Option 1.

Guest Reports

In the General Reports area, guest reports include reports related to managing the rooms, charges, and process of inhouse guest stays.

Guestware Exports

In the Utilities area, this is a Customer Relations Management (CRM) software interface. You can generate this report only if you have purchased this interface to Guestware. Contact AutoClerk Support in order to use this feature: (925) 284-1005, Option 1.

Handle Check

In the Credit Card area, this feature is only used by AutoClerk support.

Hide Rates Checkbox

In the Reservations area, Check the checkbox if you do not want the guest to see the actual room rate on their registration slip or folio. For example, if the room was reserved through an online travel website, such as Orbitz, Expedia, Travelocity, or FIT. Depending on the rate class you select, this box may already be checked.

Historical Adjustments

In the General Reports area, Past Transaction reports, this report allows you see everyone's transactions for the selected shift. The default is the day before the current date.

Historical Data

In the Utilities area, on the Historical Data window, after you set criteria in the Find button Search box, the Repeat Find button uses your criteria. You can repeat a search with these stored criteria by clicking the Repeat Find button.

Historical Folios

In the Utilities area, on the Historical Folios report, the top portion shows checked out folios in the date range selected in the History for Date window. You can use your mouse to highlight the appropriate folio. Historical Folio Display: The bottom portion shows the details of the selected folio.

Historical Group Pickup Analysis

In the Marketing area, use this report to analyze how busy your hotel property is based on the group activities. This report is usually used to analyze group-related revenues, room rentals, and average daily revenues.

Historical Group vs. Non-Group Analysis

In the Marketing area, use this report to compare your non-group revenues to your group revenues.

Historical Housekeeping

In the General Reports area, you can use this function to view modifiable historical housekeeping information.

Historical Payments

In City Ledger, Historical Payments allows you to view payment information:

Payment Received: This is the date the payment was posted. Amount: This is the gross amount that you applied. This amount includes adjustments or trade-outs (barter for room nights) that were processed as part of a payment. Check Number: This field is displayed on the payment screen. The field is optional, but its purpose is to record the check number of the payment. Days Out: This represents the number of days from today's date. Pay Type: This is the form of payment used for this transaction. Total Payments: This is the total amount for the historical payments listed for this account.

Historical Production Analysis by Class/Company

In the Marketing area, use this report to analyze where and how you may have obtained your company guests. The Company field on the New Reservation form is the place from which this report pulls its data. If a company is booked using more than one rate class, you must generate a report for each of these rate classes separately, in order to see all of the relevant data.

Historical Source Code Analysis

In the Marketing area, you can use this report to analyze where and how you may have obtained your guests. The Sources menus (on the New Reservation form) are the place from which this report pulls its data.

Historical TA Impact Analysis

In the Marketing area, use this report to analyze how travel agent activity influences the renting of your rooms. The Travel Agent section of the New Reservation form is the place from which this report pulls its data.

Historical Transaction Analysis Report

In the General Reports area, use this to filter historical transactions by specified date ranges, transaction types, and room types. You can also filter by unusual transactions.

House Status

In the General Reports area, you can use this to generate a Status report of the house for a specified date range.

Housekeeping

In the General Reports area, these reports are useful for the housekeeping staff as well as the maintenance staff.

Increase an Authorization

In the Credit Card area, you would use this feature to increase manually the authorized amount on a guest credit card. For example, your guest has $100 authorized on her credit card for a one night stay, and she extends her for another night. You can use this feature to increase manually her credit card authorization to $200. AutoClerk will do this automatically; however, not until the night audit is performed.

Individual Room Status

In the General Reports area, use this to view individual room status for a specified date range.

Inhouse Company Report

In the General Reports area, this report allows you to generate a report with company rates, balances, and folios.

Inhouse Guests Report

In General Reports, this feature allows you to generate a detailed report related to your inhouse guest's reservation and stay requirements.

Inhouse Statistics Report

In General Reports, statistical information on this report appears in two sections. The upper section of the report contains statistical information organized according to Today, Month to Date (MTD) and Year to Date (YTD). The lower section of the report contains the actual data from the same time periods (today, MTD, YTD) from which the statistics are calculated.

Inhouse Tax Exempt Setup Report

In the General Reports area, this report contains room number, guest name, occupancy tax, country tax, and reasons for the tax exemption.

Inhouse: Light Blue Green Cells

In the Tape Chart, light blue green cells represent those guests who are inhouse.

Intra City Ledger Transfer

In City Ledger, the Intra City Ledger Transfers feature allows you to transfer a posting from one city ledger account to another.

Invoicing

In City Ledger, use this feature to create detailed invoices to send to your clients.

Keys and Expiration Dates

Night Audit has a report which lists any Encryption and/or Login keys due to expire within the next 14 days. This report is generated each night for those 14 nights or until a key employee in the ACAdmin Administration User group changes the key(s). This report is also available in the Utilities area.

Last Name Field and Lookup

In the Reservation area, enter the last name of the guest in this field. When you click on the Magnifying Glass icon, you can select the guest's last name from a list of stored guest profiles. If a guest has stayed in the hotel before, selecting the guest's name from the Profile list, and clicking the Copy/OK button, automatically fills in the new reservation form with that guest's contact information.

Ledger Card(s) with Aging

The Ledger Card with Aging feature in City Ledger generates the main report you view to determine what all or specific customers owe you and their aging or how long they have owed you monies. There are three basic forms of this report: First, Second, and Third reports .Each report filters information according to specific variables you set.

Length of a Room Number

The Length of Room Number feature in ACConfig is controlled by AutoClerk support only. If you want to extend your room numbering sequences, please contact AutoClerk Support: (925) 284-1005, Option 1.

List All Outstanding Credit Records

In the Credit Card area, use this feature to see all outstanding credit transactions, including authorizations and pending sales not transmitted in the last sales batch.

List Names and Addresses

In City Ledger, List Names and Addresses produces the list of direct bill customers and their addresses for informational purposes.

List Reservations

In the Reservation area, by default, this report will give you a list of the current day's arrivals, with just basic information such as room type, number of guests and rate. If you want to see a specific date(s) and/or more detail, select Options.

Login Keys

In ACAdmin, on the Reset Encryption Keys window, you can set and reset various encryption and login keys used by the AutoClerk PMS and its interfaces. These can be thought of as passwords used by the programs themselves to invisibly login and run AutoClerk PMS on the server. For example, interfaces to the AutoClerk PMS, such as an online booking agent, as well as the AutoClerk start-up routine must use Login keys in order to function.

Lookup a Guest

Click the F2 button.

Lookup Housekeepers

In the General Reports area, you would use this to contact a housekeeper if you do not have access to personal files for phone numbers. For example, a clerk needs to call a housekeeper in to work, since another housekeeper is ill. You can look up housekeeper contact information here. The information in this feature is pulled from the Housekeeper Setup function.

Lookup Rooms and Authorize Credit Card

Click the F3 button.

Maid Sheets by Number of Maids

In the General Reports area, this report allows you to view cleaning via the filter of the number of maids.

Maid Sheets by Number of Rooms

In the General Reports area, this report allows you to view cleaning via the filter of the number of rooms.

Managers/Owners Creating User Accounts for Staff

GMs needs to create their own ACAdmin user account. This ACAdmin account is assigned permissions for the ACAdmin Administration group. This gives the GM the ability to create, modify, and delete other user accounts. Then, the GM needs to create user accounts for every employee using the AutoClerk PMS.

Mark a Handle for Deletion

In the Credit Card area, this feature is only used by AutoClerk support.

Mark All Rooms Clean

In the General Reports area, use this feature to mark all rooms except out-of-order rooms as clean. For example, when the executive housekeeper leaves for the day and informs the desk all rooms are clean, use this function instead of updating the status of each room individually.

Marketing Report Generator

In the Marketing area, you can generate a Marketing report for a specified date range. If you check only the last name, all guests sharing that last name, for example, all guests with the last name, Brown, are combined into one record. This is why the default is last name and first name. So you can differentiate each guest.

Marketing

Marketing reports are tools for analyzing information about past stays. These reports look at performance based on selected criteria of your past guest stays. Note: You can checkin to a hotel and stay for 5 nights, but this counts as only 1 stay in the way the report makes sense of this data.

Memo Button

In the Reservations area, clicking on this button opens a form which has fields for the following: Housekeeping, Telephone/F2, Checkin Slip, Checkouts Due, Group Report, Notes. Fill in the fields with applicable information.

If you enter text in the field on the main Reservation form, the other memo fields are auto-filled. Or, you can click on the Memo button and select where you want the note to appear.

If you enter text in the Notes portion of the Memo form, this text appears in the Memo field on the New Reservation form. (You can also type directly into the Memo field on the New Reservation form.)

If you enter text in the Checkin Slip field, it will appear on the guest's Registration Slip and therefore be visible to the guest.

Memo Field

In the Reservations area, enter any information specific to a guest's requests in the Memo field. Any text you enter into the Notes portion of the Memo form, which you access via the Memo button, also appears in the Memo field.

This information is also visible to the user on the Checkout screen but not to the guest.

Modify a Customer

Modify a customer is used in City Ledger to make changes to a customer's account information such as the billing address.

Modify Folio Information

In the Check In area, you might modify a folio in order to add guest contact information, change the length of a stay, and/or perform a bucket check (an end-of-shift process).

Month of Birth Fill Fields (3)

In the Reservations area, in the First field, enter the month of birth for the first guest. In the Second field, enter the month of birth for the second guest. In the Anniversary field, enter the month of a guest's anniversary. (This is a property specific configurable option.)

Moving Guests and Reservations on Tape Chart

In Tape Chart, to move an inhouse guest or reservation from one room to another, you can drag-and-drop the guest name to a specific cell.

Name of Property, Address, Cash Ceilings & Sources

Use this screen in ACConfig to set your property information, source codes, and your cash ceilings. (A cash ceiling is usually set to $0.00. You can also set ceilings for credit cards as a form of payment for inhouse guests. For a cash paying guest, if a guest has exceed their deposit, this fact shows up on the High Balance report. The desk usually contact them and tell them they have exceeded their cash ceiling. For credit cards, the ceiling is the amount authorized on any one folio.) Note: Discuss the Market Code, the M3 Report Charge Code, and the M1 Non-Taxable Percent with AutoClerk Support before changing these values.

New Group Master

In the Reservations→Groups area, in When you reserve a number of rooms for those who want to stay at your property, for example, those attending a family reunion, you create a New Group Master. This is a record of all the relevant group information that you can use as a template for each group member as you book the group member reservations.

New Reservation Fields and Buttons

In the Reservations area, use this form for booking new reservations. Any field with a label in blue is a mandatory field. You must fill in mandatory fields for AutoClerk to save a reservation.

New Reservation Tool Bar

In the Reservations area, the Tool bar appears across the top of the screen.

New Reservation

In the Reservations area, this is a new guest reservation.

Night Audit Report Suppression

Use this feature in ACConfig to suppress the Night Audit reports you do not wish to print out during the Night Audit process.

Night Audit

This is found in the Functions area. Much of a night auditor's job is property specific. The function of a night audit is to use AutoClerk's features to do as follows:

- Automatically posts room and tax to inhouse rooms and folios
- Transmits the sales batch
- Obtains increases in credit card authorizations as necessary
- Backs up data
- Closes out the data for the day
- Begins a new day cycle of data

No Show

In the Reservations area, a no-show is a guest who does not show up for their reservation. Your hotel policies require you charge their credit card, since they didn't cancel according to policy. You can see a list of no shows by clicking on the No Show checkbox.

Non-Vacant and Dirty Rooms Report

In the General Reports area, this report provides a list of non-vacant and dirty rooms.

Notes

In the General Reports area, use this feature to display All Notes, Guest Folio Notes, and Undelivered Guest Messages.

Number of Managers and Owners Using ACAdmin

In ACAdmin, you are permitted more than 1 user in the AC Administration group.

Occupancy Report

In the General Reports area, you can use this to generate a report filtered by date ranges and the types of guests or rooms used in that date range.

Options

Do *not* use this feature in ACConfig until you contact AutoClerk support: (925) 284-1005, Option 1.

Ordered Report

In the General Reports area, you use this report if you assigned rooms to housekeepers and/or you modified the reporting order of your rooms.

Out-Of-Order Rooms Report

In the General Reports area, this report provides a list of those rooms that are out-of-order.

Out-of-Order: Red Cells

In the Tape Chart, red cells represent out-of-order rooms. For each day that a room is out of order, AutoClerk displays Out of Order. Out of Order cells have a red background.

Pace Report Export

In the Utilities area, this report shows if your reservations are on pace with your forecast.

Package Breakouts

Use this in ACConfig to assign the pricing to the amenities in the package. You can have many different package breakouts. For example, a typical package breakout includes the room charge, the candy, the breakfast, the show tickets, and the champagne.

Package Setup

Use this feature in ACConfig to set up packages using package breakouts. For example, you can set up a Romance package or a Mother's Day package that includes different breakouts. For example, the Mother's Day package might include a lunch, flowers, and candy.

Password Requirements

All AutoClerk PMS and ACAdmin users are now required to have a password. All users must follow these rules when creating new passwords: Contain at least 7 characters, at least one letter, at least one numeric digit, change every 90 days. New passwords cannot be one of the last 4 passwords used. In addition, an AutoClerk password may create passwords with the following rules: Contain at least one uppercase letter, at least one lowercase letter, at least one non-alphanumeric character. Usable AutoClerk password characters are: ` ~ @ ^ _ = \ | { } [ ] : ; < > ?

Past Transaction Reports

In the General Reports area, Past Transaction reports contain the same report types as Transaction reports. But the date for the data must be before the current day.

Pay Type Button

In the Reservations area, the text on the Pay Type button changes according to the pay type you select from the Pay Type menu. For example, if you select Visa, clicking the Pay Type button opens a form in which you can enter the credit card number, name of the card holder, expiration date, and authorization code.

If you select a City Ledger account, the name of the account appears. If you click on the button, you will see the City Ledger account contact information. If the name is flashing in red, then the City Ledger account has an F8 note which should be viewed for any additional information.

Pay Type Pull-Down Menu

In the Reservations area, clicking on the Pay Type button opens a list from which you can select a desired payment type to guarantee a reservation. If the pay type is cash, the status of the reservation will be hold, until an advance deposit is posted. Other pay types listed are the configured credit card types and City Ledger accounts.

If you select a City Ledger account, a popup appears asking if you want to use the CL account address as the Company address. If you answer yes, then the Company address fields will be auto-filled.

Payment Due/High Balance Report

In the General Reports area, you can generate this report to see future projected charges for different types of guests filtered by different criteria, for example, by name or date of departure. This report will list any inhouse guest folio which has exceeded it's cash or credit card authorization.

People Fields

In the Reservations area. In the first field, enter the number of adults associated with this reservation. In the second field, enter the number of children. In the third field, enter the number of babies associated with the reservation.

Permanent Reservations

In the Marketing area, this report shows you all of your permanent reservations and their respective status.

Permanent Reservation

In the Reservations area, you can use this function if you want to set up a template reservation. This can be useful for corporate accounts. There is also a report you can generate via the Marketing area.

Permission Levels

There are currently 5 areas within in ACAdmin in AutoClerk where you can restrict permission level access.

Phone Messages and General Messages

On the Guest Lookup window, if you single click to highlight a guest name, and the Phone Msg button appears in red, it means that guest has a message. For example, someone called the desk to leave a message for the clerk to give to the guest.

Post a Partial Payment

In City Ledger, the Post a Partial Payment feature is used to post payments where the entire amount of a customer's folio(s), statement, or invoice was not received. You can only post partial payments as cash or checks only--no credit cards.

Post a Payment

You post a payment in City Ledger in order to enter payments received from direct bill customers for services rendered.

Post a Re-Occurring Charge

In City Ledger, you can use the Post a Re-occurring Charge feature to charge rent or membership fees. Basically, you can assign to an account those charges which occur on a regular basis such as monthly or weekly charges. The charges are only posted to those accounts with the specified transaction code in the Comment field.

Post a Ticket

In the Posting area, Post a Ticket is a sequential process. You must post and close the charge and the payment in two steps. Step 1 is to post any and all charges, perhaps a guest purchases three hotel t-shirts. Step 2 is to post the payment for these purchases. You must have a $0.00 folio balance in order to complete the ticket. Another example might be a non-guest who wants to pay for a fax. In this case, you post the fax charge, and then post the payment.

Post an Advance Deposit to a Master

In the Reservations→Groups area, a group member pays in advance for a room. In order to apply this payment to the group member's account, you post the payment in the form of an advance deposit to the group master. Groups are organized by the group master.

Post Monthly Interest %

In City Ledger, the Post Monthly Interest feature is used when you are a hotel that has a direct bill account with interest on balance incurred on a monthly basis. You can use this feature on a customer-by-customer basis. The interest rate is entered in the Interest % Charged field that appears on the Add or Modify a New Customer to City Ledger screens. When you use this feature, AutoClerk looks in this field, takes the percentage rate, calculates the interest on the balance and posts it. For example, if you a direct bill have a $100 balance, and the monthly interest is 10%, the charge is now $110 dollars. The amount appears as a Late Fee line item on the clients account. Note, to use this feature, you need to set up a Charge Type option to use specifically for interest charges. See ACConfig for more information.

Post to a Room

In the Posting area, you can use this feature if you want to post a single charge or payment to an inhouse guest's room/folio instead of using the F9 button. It is also convenient if you need to post multiple charges of different amounts to several rooms. For example, the evening shift needs to post laundry charges to several rooms. In Post to Room you can post room charges.

Post to No Room

In the Posting area, Post to No Room is a sequential process. You must post and close the charge and the payment in two steps. Step 1 is to post any and all charges, perhaps two bathrobes. (The tax automatically posts for taxable items once this is setup in AutoClerk.) Step 2 is to post the payment for these purchases. You must have a $0.00 folio balance in order to complete the posting. Another example might be a non-guest who wants to pay for a fax. In this case, you post the fax charge, and then post the payment.

Pre-Audit Checks

In the Functions areas, the pre-audit checks are determined by the auditor's assigned tasks. This varies from auditor to auditor and is often property specific.

Print All Inhouse Guest Folios

In the General Reports area, use this command to print out all of the guest folios for those guests who are due to checkout.

Print Folios Due to Checkout

In the General Reports area, use this command to print a report of all guest folios due to checkout of your property. You can choose to ignore folios without transactions.

Print Prior Sales Batch(es)

In the Credit Card area, this feature allows you to reprint a sales batch from a previous day.

Profile Survey Generator

In the Marketing area, you can generate this report for either a person, company, or travel agent. Note: The larger the date range, the longer the report takes to generate. You may want to start with a smaller date range, and then grow your criteria after you have generated a few reports.

Profiles

In the Functions area you can access different types of profiles. Profiles are a history of stays categorized by home, company, or travel agency. When making a reservation, accessing profiles can streamline the process and make it faster.

Profiles

In the Reservation area, on the Reservation screen Main Menu, Profiles contains commands that allow you to search for a Guest's profile by last name, by first name and last name, or search by company name.

Rate Class Pull-Down

In the Reservations area, clicking on this menu opens a list of possible rate classes and their abbreviations. It defaults to Rack. You can also select a rate associated with a guest's affiliation or membership privileges. For example, if a guest is an AAA member, select the AAA rate class from the list.

Rate Classes

Use this in ACConfig to set your rate classes; this includes your group rate classes. Note: Make sure one rate class is denoted as the Rack rate class. You can have only one Rack rate class. But you must denote this class in order for the other rate classes to work.

Rate Setup Grid

Use this feature in ACConfig to assign rates to your rate classes and room types.

Rate Setup

Use this in ACConfig to set your room rates per rate class per room type. There are three main features in the Rate Setup area: Rate Setup Grid, Tier Setup, and (Tier) Selection Rules.

Re-Assign an Authorization

In the Credit Card area, if for any reason a credit card authorization is assigned to the wrong room number, you can use this function to assign it to the correct room number.

Re-Encrypt Data Set

In ACAdmin, run this tool as least once per year or anytime you believe your data is compromised. This tool sets a new Encryption key for your credit cards and then re-encrypts the data.

Registration Slip Numbers Report

In the General Reports area, this report requires that you enable Registration Slip Number Tracking. Please contact AutoClerk Support to enable this feature.

Registration Slips

In the Reservations area, these are registration cards for those guest due to arrive on the current or specified future day. You can print one registration slip or group reservations.

Report Options

Use these in ACConfig to set up additional reporting feature options.

Requested Checkbox

In the Reservations area, check this checkbox if the guest has requested a certain room. This feature is used for those guests who travel frequently, for example, and desire to stay in the same room each time they visit.

Res Type Pull-Down

In the Reservations area, the Res (Reservation) Type menu allows you to choose from five different Reservation types: GTD/Hold (Guaranteed Hold), Share with, Gift Cert. (Gift Certificate), Wait List (Waiting List), Prof Update (Profile Update).

Reservations

Reservations are the means by which a property holds a room for a guest on agreed for an agreed upon number of days.

Reserved: Yellow Cells

In the Tape Chart, the yellow cells represent those rooms that are reserved. If the reservation is guaranteed, all of the letters of a guest's last name are in an upper-case font. If the reservation is not guaranteed, the guest's name appears in a lower-case font.

Resetting a Key

In ACAdmin, you reset Encryption and Login keys at least once a year. But you may wish to reset keys any time you believe AutoClerk data might be compromised. If you reset the Encryption and Login keys, you must also reset the Backup keys and re-encrypt the data. The Reset Encryption Keys window displays headings for Key Name, the Expiration (date) for the encryption keys and logins, and a Description. All keys, except the Backup keys, are automatically generated, so no user input is required.

Resetting the AutoClerk License Key

In ACAdmin, the AutoClerk License key can only be reset by AutoClerk Tech staff. Computer stations added to the AutoClerk network cannot access the AutoClerk PMS until AutoClerk Support increases the number of licenses.

Rm Type Pull-Down Menu

In the Reservations area, clicking on this menu opens a list of possible room types and their associated abbreviations. Select a room type from the available list.

Room Chart

In the General Reports area, you can use this to generate a report that allows you to filter by Room Types you wish to see in the Room Chart.

Room Features

In the General Reports area, use this to generate a report of rooms filtered by specified features. Feature are pre-defined through ACConfig. If a room has a specific feature, there is a Y (yes) in the Feature column. The elements on this report could be as follows: HC: Handicapped room, VW: Room with a view, SP: Room with a spa, QU: Quiet room, RF: Refrigerator in room, C: Room has a connecting door

Room Notes - Add/Mod/View/Delete

In the General Reports area, this function allows you to attach notes to specific rooms. The notes are relevant to the room, not the guest; for example, when to deep clean the room.

Room Pull-Down Menu

In the Reservations area, clicking on this menu allows you to select a specific room for the reservation. The screen auto fills in the room type, number of nights and arrival date based on the reservation. You can also see a list of room features. Select all applicable room features from this list. Click the OK button, and you are brought to a list of clean, unblocked rooms you can assign. Select a room by clicking on it. You are brought back to the main New Reservation form with that selected room number now displayed in the field.

Room Stack Reports (Yearly and Monthly)

In the Marketing area, this report breaks out the activity for each room based on the historical files. You can run this report so it shows the units rented or the revenue generated. This report shows the data by room number.

Room Status

In the General Reports area, you can generate, for example, reports related to room status details, such as occupancy or availability.

Room Transfer

In the Check In area, This function can be used if a guest decides to extend their stay and needs to change rooms, or a guest checks in and decides he would like a different room.

Rooms Field

In the Reservations area, in this field, you enter the number of rooms of the same room type that the guest wants to reserve. You can enter up to 9 rooms. If you enter more than one, when you have completed and saved the reservation, AutoClerk will automatically create clone reservations with separate confirmation numbers.

Running a Night Audit

In the Functions area, you can run the Night Audit at any time but only on the current day. For example, if your front desk is closed from 10pm to 7am, you can run the Night Audit at 9:30pm or 6:30am.

Running ACAdmin and Station #1

You can run ACAdmin from a shortcut on any AutoClerk station on the property's network. However, when ACAdmin is in use, it takes over as Station #1. Other stations can continue to use AutoClerk, just not the computer designated as Station #1.

Search

Click the F2 button.

Set AutoClerk Colors

Use this feature in ACConfig to set the background colors you desire on your AutoClerk application.

Set CRS Channels

This feature in ACConfig sets the code and description for any Central Reservation System (CRS) to which your property is connected.

Please contact AutoClerk support before using this feature: (925) 284-1005, Option 1.

Set Housekeeping Defaults

Use this feature in ACConfig to add details to room numbers. These additional details appear in the Housekeeping reports.

Set Housekeeping Room Use

Use this feature in ACConfig to set the Default Housekeeping Room Used For menu items in the Set Housekeeping Default feature.

Set Options

This feature in ACConfig sets AutoClerk-specific options. Only AutoClerk Support can access this feature.

Set Passwords

Use this area in ACConfig to set your property access codes for specific areas in your AutoClerk program. Note: Passwords must be alphanumeric only. You can't use special characters like punctuation or programming code standards, for example, {}. Passwords are also case sensitive.

Set Reservation Options

Use this to feature in ACConfig to name user-defined fields in a Reservations form.

Set Sales to No-Show

In the Credit Card area, this feature allows you specify that an existing credit-card posting is for the processing of a no-show instead of a regular sale. A no-show is a guest who does not show up for their room, and your hotel policies require you charge their credit card, since they didn't cancel according to policy. This feature is only used by AutoClerk support.

Setting Tape Chart Parameters

While using the Tape Chart feature, you can set the parameters in order to view a certain date range you desire to view.

Setup Credit Card Mapping for Interfaces

Use this feature in ACConfig if you do not need to set the payments or charge types, but need to set up the credit card type only. This is a shortcut, in a sense, to credit card mapping. You are more likely to use this feature when AutoClerk technicians are converting properties to AutoClerk. Note: The Interfaces window is populated from the Credit Card Map Types fields on the Define Non-City Ledger Transaction window.

Setup GuestWare Charge Types

GuestWare is a CRM (Customer Relations Management) interface. This feature in ACConfig is only enabled if you purchased the interface. Please contact AutoClerk support before creating any payment types or charge types: (925) 284-1005, Option 1.

Setup Housekeepers

In the General Reports area, this function allows you to set up account and contact information for the housekeeping staff.

Setup Mas90/Quickbooks Mapping

If you purchased Mas90 of the Quickbooks interface, use this feature in ACConfig to map your payment codes and your charge codes.

AutoClerk technicians will help you configure this feature. Please contact AutoClerk support before using this feature: (925) 284-1005, Option 1.

Setup Pace Data Export Parameters

You cannot use this feature in ACConfig until you contact AutoClerk support: (925) 284-1005, Option 1.

Setup Room Ordering and Suppression

In the General Reports area, you can use this to configure room order and suppressed rooms for the Ordered Housekeeping report. You do not need to set the parameters for this report on a daily basis. This feature doesn't generate a report. It is a function that informs the Housekeeping→ Ordered report.

Show Credit Card Logs

In the Credit Card area, you can use this feature to view all of the transactions associated with a particular credit card.

Show Guarantee Info Button

In the Reservations area, clicking on this button opens a box in which you can view the default Deposit Due, Amount Needed, and Cancel Deadline.

Smkr Field

In the Reservations area, Smkr designates a guest who is a smoker. This can be helpful when you want to ensure that a smoker gets a smoking room.

Source Code Text File Setup

Use this feature in ACConfig to define all of your source codes. The source codes on the Reservation form are pulled from the Source Lists window.

If you add, delete, or modify source codes in the first column (Source List 1), then you must change the source codes listed in the configuration sub-menu item: N: Name of Property, Source 1, Ceilings.

Sources Pull Downs

In the Reservations area, clicking on the Sources menus allows you to select the source of a guest's reservation from a configured list. There are three menus associated with sources. Required source fields, if any, are determined by your property.

Specials Field

In the Reservations area, the Specials field is a field used for requests or details specific to the reservation. It can also be used for specific confirmation letters to be sent. In addition, it can be used as a filter when obtaining a list of arrivals.

Standard (M1 and Sorted Detail)

In the General Reports area, Past Transaction reports, this report is for any day before the current day and report lists totals for each ledger as well as detail on each transaction posted during the specified shift and the associated clerk(s).

Standard (M1 and Sorted Detail)

In the General Reports area, this report is for the current day only.This report lists totals for each ledger as well as detail on each transaction posted during the specified shift and the associated clerk(s).

Standard Report

In the General Reports area, the Standard report provides a housekeeping report without any modifications, such as room order or assigned housekeepers. If you need to modify the format or assign housekeeping staff, use the Ordered report.

Stay Total Button

In the Reservations area, the Stay Total button allows you to see the deposit, room charges due, and applicable taxes associated with a reservation. It is displayed both as a total and on a day-to-day basis.

TA to Fourstar

In the Utilities area, this is a back-office accounting software interface. You can generate this report only if you have purchased this interface to Fourstar. Contact AutoClerk Support in order to use this feature: (925) 284-1005, Option 1.

TA to Quickbooks

In the Utilities area, this is a back-office accounting software interface. You can generate this report only if you have purchased this interface to Quickbooks. Contact AutoClerk Support in order to use this feature: (925) 284-1005, Option 1.

Tape Chart Cell Colors, Descriptions, Features

Cells shown in the Tape Chart contain one of the following background colors: Clean, Vacant, Not Reserved: White, Inhouse: Light blue green, Reserved: Yellow, Out-of-Order: Red.

When you place your mouse cursor over a certain cell, additional information displays at the bottom of the Tape Chart window. For example, placing your mouse over a yellow, Reservation cell, displays the following: Room number, Smoking or non-smoking, Confirmation number, Checkin and checkout dates, Balance, Form of payment, How many people in the room, Rate.

Tape Chart

The Tape Chart is another way to use AutoClerk. It allows you to access many of the AutoClerk functions from one central area.

Tape Chart is designed as an interactive user interface, which displays a grid in which the columns hold dates and the rows hold room numbers. (When there are too many rows and columns to fit on a screen, scroll right and left as well as up and down to view any portion of the chart.)

Tax Posting Variations Report

In the General Reports area, this report contains the room number and type of tax assigned to that room, the dollar amount for the room, the actual tax on that amount, the tax by rule, and the difference.

Tax Setup

Use this in ACConfig to setup your Occupancy, Sales, and any additional taxes your property uses. Please contact AutoClerk Support before using this feature: (925) 284-1005, Option 1

Telephone List Report

In General Reports, this feature allows you to generate various types of inhouse guest phone lists.

Tier Selection Rules

Use this in ACConfig to setup Tier Selection rules that control the rates that you sell at your property. For example, the rules might include high, low, and default rates, all of which are controlled by percentages used by the rules. This is a complicated configuration and can adversely affect the way you sell your property if it is configured incorrectly.

Tier Setup

The Tier Setup area in ACConfig allows you to set up how many rate tiers you wish to use at your property. For example, you can setup a default, a high, and a low rate tier. (These tiers are controlled by Rate Tier rules you set in ACConfig.)

Title Field and Lookup

In the Reservations area, click on this menu. From the list of titles select a title for the guest.

Today's Adjustments

In the General Reports area, use this to lists all adjustments posted for the shift and clerk you selected.

Today's Setup

In the General Reports area, this feature pulls information on a per room basis, so you have a snapshot of room status and assigned housekeeper.

Totals Only (M1 Only)

In the General Reports area, Past Transaction reports, this report is the first two pages of the Past Transaction→ Standard (M1 and Sorted Detail) report. Use this if you want to see the totals and don't need the transaction details. This report is for dates before the current date only.

Totals Only (M1 only)

In the General Reports area, this report is the first two pages of the Standard (M1 and Sorted Detail) report. Use this if you want to see the totals and don't need the transaction details. This report is for the current day only.

Transaction Reports

In the General Reports area, these types of reports are related to finances and monies.

Transaction Types

Use Transaction Types in ACConfig to define your transaction types; for example, Room, Tax, Visa, MasterCard.

Transfer an Advance Deposit to a Folio

In the Posting area, you can use this function if a clerk incorrectly checks in a guest without realizing an advance deposit was made. For example, the user checks in a walkin. After checkin, the guest informs the clerk they have a gift certificate. You can transfer the deposit from the gift certificate reservation to the checked in guest's folio. You cannot transfer a deposit to a folio, which has any transactions already posted to it.

Transfer Folio Transaction(s)

In the Posting area, you can use this function if you need to transfer transactions from one room and folio to either the same room and a different folio or a different room and folio. For example, a daughter decides to pay for her own room as well as her parent's room and tax. In this case, transfer the parents' room and tax charges to the daughter's folio.

Transmit Authorization Batch

In the Credit Card area, this feature transmits authorizations only. If you need to use this feature, AutoClerk support will instruct you to use it.

Transmit Sales Batch

In the Credit Card area, normally the sales batch (settled sales) is automatically transmitted by the night audit. If you wish to transmit the batch early, or for some reason the transmission during the night audit failed, you may use this function to transmit the sales batch.

Travel Agency Button and Lookup

In the Reservations area, clicking on the Travel Agency button opens a form in which you can enter travel agency contact information. Clicking on the Magnifying Glass icon redirects you to profiles for travel agents. If the travel agent has booked at the hotel before, selecting the agency's name from the Profile list, and clicking the Copy/OK button, automatically fills in the new reservation form with that agency's contact information.

If necessary, update any of the contact information, such as a different agent making the booking.

Travel Agent Check Format

Use this in ACConfig to format the commission check your property sends to applicable travel agents. Please contact AutoClerk Support to configure this feature: (925) 284-1005, Option 1.

Travel Agent Check Processing

In the General Reports area, use this to produce a report of travel agent commissions due for a specific month. If configured, it can print travel agent commission checks (See ACConfig for more details and contact AutoClerk to set up this feature.) In addition, it can produce a report only for secondary travel agents.

Travel Agent Historical Folios

In the Utilities→Mailing Lists→ Travel Agent Historical Folios, you can use this to display or print travel agent historical folio in ASCII delimited text.

Undelivered Guests Messages

In the General Reports→Notes area, this feature allows you to view the text of all Undelivered Guest Messages.

Undo an Authorization

In the Credit Card area, you can use this feature to release an original credit card authorization (for which no sale will be posted) from the system, and replace it with another form of payment. For example, a guest arrives and presents a Visa credit card. An hour later, the guest informs you he plans to pay with an American Express credit card. You use this feature to release the Visa authorization and immediately send that information to the bank. The actual authorization release terms are set by individual banks. Guests may need contact their bank for more details.

Update Rooms Status

In the General Reports area, use this to change the status of multiple rooms at one time. For example, if you need to place 5 rooms out-of-order for cleaning, this feature allows you to perform this task at once.

Upgrading, Prior Versions of AutoClerk, and Passwords

If a property is upgrading from AutoClerk Version 6, the conversion process deletes all existing AutoClerk clerk IDs and passwords, so you must create new ones.

User Account Passwords

When you create a user, a default password for each user account is generated by ACAdmin. Users can login with this system-created password only one time. During the first login session, the user has to reset the system password to one of their choosing. The password created by the user is only known by that user, since it is not created or entered into the system by anyone else.

User Accounts

In ACAdmin, a user is required to belong to at least one of the groups available. Per usual, the three required variables for each user must be unique for each user account. A user account consists of the following: Clerk ID, User Name, User Initials

User Defined Options

This feature in ACConfig sets AutoClerk-specific options. It gives you the list of codes that you can use for the Set Options area. Only AutoClerk Support can access this feature.

User Field 1

This is a customizable field through ACConfig.

User Field 2

This is a customizable field through ACConfig.

User Group Types

In ACAdmin there are 4 default user groups. The first 3 user groups relate to performing functions in the AutoClerk PMS. The fourth user group is the AC Administration group.

User Groups

User Groups in ACAdmin is where functions are assigned to an individual user based on the group's functions.

User-Groups Setup

In ACAdmin, you can add and define what functions a new user group can perform. Groups define user functions. A group record consists of a group identifier, a group description, and a list of functions,

View Logs

You can view logs in ACAdmin. PA-DSS requires the PMS (AutoClerk) to log all activities that pertain to credit cards. For example, a clerk views a full credit card number in a reservation in order to charge a no-show guest; this is logged. Each installed interface also creates a log regardless of whether or not credit card and/or security are involved. Depending on the PCI and PA DSS requirements, the AutoClerk PMS retains the logs files for up to a year. Logs can also be viewed to troubleshoot problems and/or research issues.

View Rooms

In the General Reports area, you can use this to generate a report by filtering your results by room status during a specified number of days.

Voice Authorization

In the Credit Card area, you can use this feature if you swipe a credit card, and the credit card processing center returns a message requesting you call for verification. The credit card processing representative will give you voice approval as well as an authorization code for the credit card transaction. This feature allows you to manually enter the credit card number, authorization amount, and credit card processing center authorization code.

Void a Rebate

In the Credit Card area, you use this feature to void a rebate which was posted to a credit card by mistake. In effect, the void reverses the rebate. This feature can be used after you contact AutoClerk support: (925) 284-1005.

Void Folio Posting

In the Posting area, this feature is designed to fix posting mistakes or reverse postings that don't apply to the client. For example, a guest was charged for a movie, but never watched the movie.

Wipe Excess Authorization from Sales Batch

In the Credit Card area, this feature is used only by AutoClerk support.

Work Schedule

In the General Reports area, you can use this feature to print a daily work schedule, for example, to give to staff such as housekeeping or the front desk.

Yield Management Notes

In the General Reports area, you can use this feature to view and enter Yield Management note text.

Yield Management

In the Yield Management area, the Yield Management Analysis report allows the user to combine data from the past, present and future to get a complete view of what business is on the books.

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