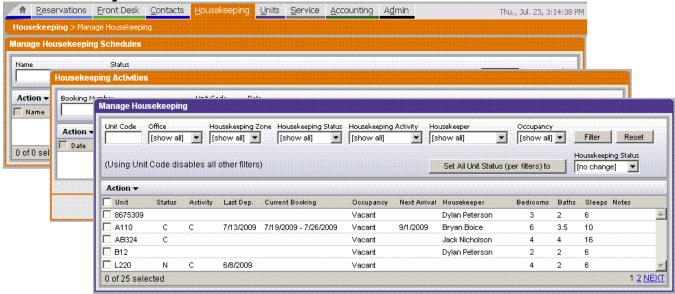
EscapiaVRS



Housekeeping Module

Purpose:

This document lists the detailed steps needed to properly setup, utilize and manage the EscapiaVRS Housekeeping Module.

Scope:

EscapiaVRS Housekeeping Module EscapiaVRS Setup Module EscapiaVRS Reservation Module

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Summary of Updates and Changes

Here is a very quick summary of the User Interface changes.

Reservation Setup

Reservation Tab > Setup > Reservations

The Advanced Housekeeping Activation & Configuration Settings are at the bottom left of the page.

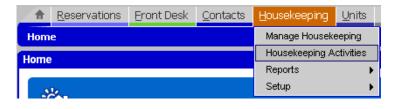


Housekeeping Menu

Housekeeping Tab >

The advanced Housekeeping Setup options and reports are located in the housekeeping tab.

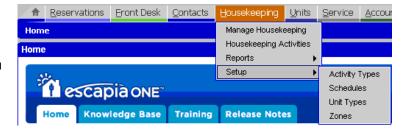
Housekeeping Main Menu



Housekeeping Reports Menu



Housekeeping Setup Menu



Setup

General Reservation Setup

Reservations Menu > Setup > Reservations

Before you can begin using the Advanced Housekeeping module it has to be enabled. The default state for the module is to be disabled. Please note that you can configure your settings before you enable the advanced module. If you enable the advanced housekeeping before setting up schedules it will remove any activities you have already scheduled so be sure you are ready before enabling.

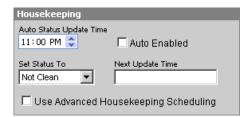
Check the box next to "Use Advanced Housekeeping Scheduling" to enable the advanced housekeeping module.

If you wish to enable the auto checkin/checkout feature just check the boxes. This option automatically checks guests in and out of the bookings. Note: if a guess doesn't show, you will need to manually undo the auto checkin. Please note that the auto checkin process will keep checking in any booking that is not checked in until midnight local time, even if it has been manually undone.



Changing Housekeeping Settings

At the bottom left corner of the dashboard are the housekeeping configuration controls.



The Advanced Housekeeping module controls in the General Reservation Setup dashboard allow you to set the time when the housekeeping Status should change and select the status. This will set the Housekeeping Status for each unit with a checked in booking to the selected status (essentially always it will be "Not Clean") so that the unit status does not have to be changed manually each day. Note this happens for CHECKED IN bookings only.

In the bottom left corner of the General Reservation Setup. . .

- Place a check mark in the check box labeled AUTO ENABLED.
- In the AUTO STATUS UPDATE TIME field, enter the time when the status updates should occur.
- In the SET STATUS TO field, select the status that will be used at the designated time.
- Click the SAVE button at the bottom of the dashboard page to save the changes.

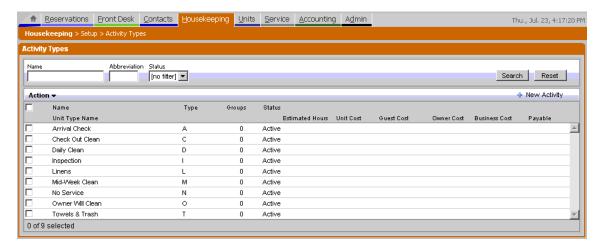
Upon re-entering the General Reservation Setup dashboard, the next update time will appear in the NEXT UPDATE TIME field.

Setup (continued)

Setting Up Activity Types

Housekeeping Menu > Setup > Activity Types

One of the first steps will be to setup the Activity Types. The types represent the different types of cleaning services you perform. For example, Arrival check, check out clean, etc.



Prior to this release, the housekeeping module's Activity types were hard coded and not user defined. As of EscapiaVRS version 7.3 the Activity Types are user defined records that can be added, removed or changed. Note that if an activity is set to inactive it will be removed from any schedule that includes that activity. However, if the activity was manually entered in the booking it will remain active for that booking.

To create an activity type, first navigate to the Housekeeping setup menu. . .

- Click on the HOUSEKEEPING tab.
- Then click on the SETUP sub-menu.
- Then select the ACTIVITY TYPES option.

The Activity Types page will display the search tool at the top of the page (similar to the other modules in EscapiaVRS). Below the search tool are the ACTION and NEW ACTIVITY buttons and below the buttons are the search results. To open an Activity Type record, highlight and click on any of the displayed search result records.

To edit the existing Activity Type records, highlight the record from the results list and then click on it. It will open that record and display the Activity type record's properties. Make your changes and then click the SAVE button.

To create a new record, click on the NEW ACTIVITY button. In the New Activity page. . .

- In the NAME field, enter the name of the housekeeping activity type.
 - o For example, check out clean, maintenance, etc.
- In the ABBREVIATION field, enter the letter that will be used in the housekeeping reports that will denote the specific cleaning type you are creating.
 - For example, if our Housekeeping Name is CHECKOUT CLEAN, we can enter the abbreviation, CO, etc.
- In the STATUS field, select the ACTIVE option

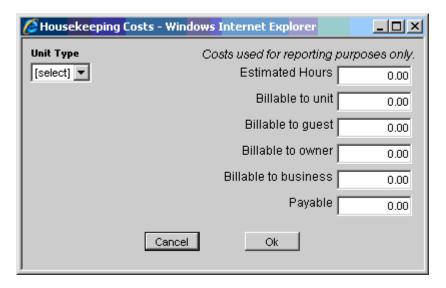
Setting Up Activity Types (continued)

Adding Costs to Activity Type Records

You can also associate costs with the Activity Type. If you do not wish to attach COSTS to the Activities you just created, click the SAVE button. If you will be adding costs to the tasks you created, click the NEW HOUSEKEEPING COST button.

PLEASE NOTE: The housekeeping costs module is not integrated with the accounting module. Therefore, the cost records created are used specifically for record noting and reporting purposes and do not perform automatic billing functions.

To add a new housekeeping cost record. . .



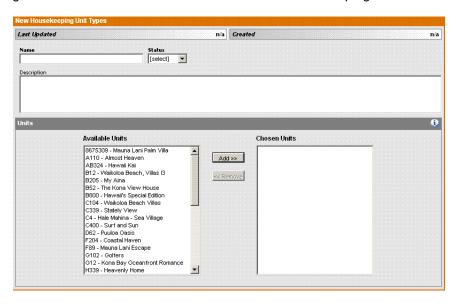
- Click on the NEW HOUSEKEEPING COST button at the top right.
- In the UNIT TYPE field, select the unit type you wish to use.
- In the ESTIMATED HOURS field, enter the <u>estimated</u> number of hours needed to perform the specified activity.
- In the BILLABLE TO UNIT field, enter the \$ amount that will be charged against the unit.
- In the BILLABLE TO GUEST field, enter the \$ amount that will be charged to the guest.
- In the BILLABLE TO OWNER field, enter the \$ amount that will be charged to the owner.
- In the BILLABLE TO BUSINESS field, enter the amount that will be charged to the business.
- In the PAYABLE field, enter the amount that would be paid the business or vendor for the service.
- Once you have completed the cost information, click the OK button to save the changes.
- Click the SAVE button in the Activity Type page to save all the changes or continue to enter new Activity Types and Costs.

Setup (continued)

Setting Up Unit Types

Housekeeping Tab > Setup Menu > Unit Types

Similar to Advanced Rate Engine's Unit Groups, Advanced Housekeeping's UNIT TYPES is a user defined collection or grouping of units that can be used with the Advanced Housekeeping schedule.



To create a Housekeeping UNIT TYPE. . .

- Click on the HOUSEKEEPING tab.
- Click on the SETUP menu.
- Select the UNIT TYPES option.
- In the Housekeeping Unit Types dashboard, click on the NEW button at the far right.
- In the NAME field, enter the name of your Unit Type (for example: 1BR 1BA, etc).
- In the STATUS field, select the ACTIVE option.
- In the DESCRIPTION field, enter details describing the unit type, if needed.
- In the Units section, in the AVAILABLE UNITS column, select the units for the unit group you are creating.
 - You can select one unit by clicking on it, or multiple units by holding down the Control key on your keyboard [CTRL] and then clicking on select units.
- Once you have selected the units for the unit group, click on ADD button.
- Verify the units are now listed in the CHOSEN UNITS column.
- Click the SAVE button to save the unit type changes.

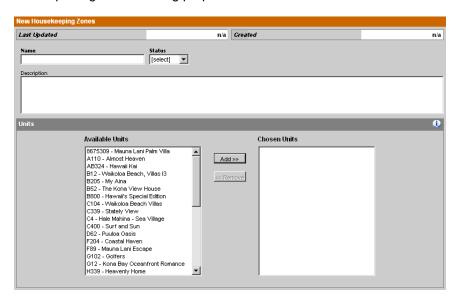
The unit types can then be accessed when creating your Housekeeping schedule.

Setup (continued)

Setting Up Housekeeping Zones

Housekeeping Tab > Setup Menu > Zones

Similar to using OFFICES and UNIT GROUPS in EscapiaVRS, Housekeeping Zones is another way for you to group your properties for reporting or scheduling purposes.



To create a Housekeeping Zone. . .

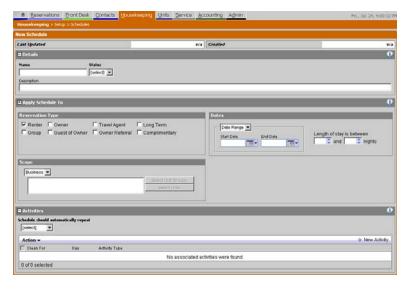
- Click on the HOUSEKEEPING tab.
- Click on the SETUP menu.
- Select the ZONES option.
- In the Housekeeping Zones dashboard, click on the NEW button at the far right.
- In the NAME field, enter the name of your zone (for example: Ocean Condos).
- In the STATUS field, select the ACTIVE option.
- In the DESCRIPTION field, enter details describing the zone, if needed.
- In the Units section, in the AVAILABLE UNITS column, select the units for the unit group you are creating.
 - You can select one unit by clicking on it, or multiple units by holding down the Control key on your keyboard [CTRL] and then clicking on select units.
- Once you have selected the units for the unit group, click on ADD button.
- Verify the units are now listed in the CHOSEN UNITS column.
- Click the SAVE button to save the unit type changes.

Set Up

Setting Up Schedules

Housekeeping Menu > Setup > Schedules

When a new booking is created it will automatically generate a list of housekeeping tasks to be performed and the day they should be performed. The advanced housekeeping module allows you to create multiple schedules based on the booking type, length of stay, or type of guest. The schedule functions similarly to the advanced rate engine in that it allows you to create both CONDITIONS (when an action occurs) and the ACTIONS.



To Create the Schedule. . .

- Click on the HOUSEKEEPING tab
- Click on the SETUP menu
- Select the SCHEDULES option

This will navigate you to the MANAGE HOUSEKEEPING SCHEDULES Dashboard. The search tool will be displayed at the top of the page with the results list displayed below it.

At the Top Right of the page. . .

• Click on the button labeled NEW SCHEDULE

This will navigate you to the NEW SCHEDULE page. The page is broken into 3 main sections, Details, Apply to Schedule (which functions like an Advanced Rate CONDITION) and Activities (which function like advanced rate ACTIONS).

Setting Up Schedules (continued) **DETAILS Section**

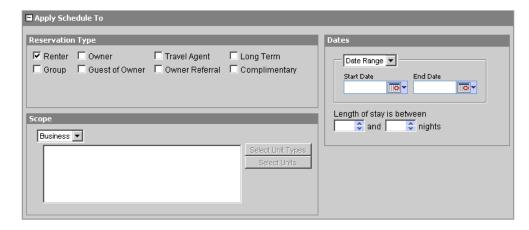
The Details section of the Schedule holds basic schedule information.



- In the NAME field, enter the name of the schedule.
- In the STATUS field, select the ACTIVE option.
 - o You can select the INACTIVE option if you do not wish to use this schedule in bookings.
- In the DESCRIPTION field, enter details about this schedule.

APPLY SCHEDULE TO Section

The APPLY SCHEDULE TO section functions similar to Advanced Rate Engine's CONDITIONS. We will use this section to select the criteria needed for a specific housekeeping action to be triggered. There are three boxed subsections in the APPLY SCHEDULE TO section.

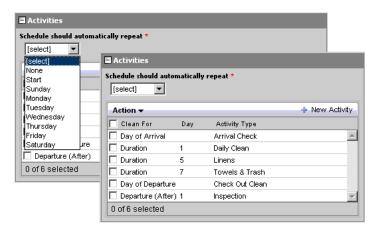


- In the RESERVATION TYPE box, select the Reservation type that will be associated with this Schedule.
- In the SCOPE box, select whether this schedule applies to all units in inventory or to selected units.
 - If you select the UNIT option, then click the SELECT UNIT TYPES or SELECT UNITS button
 - To use the SELECT UNIT TYPES button, you must first have Unit Types setup in EscapiaVRS.
- In the DATES box, you have the option of selecting DATE RANGES or SEASONS to associate with the schedule.
 - o If you select DATE RANGE, enter the Start and End dates to use in your range.
 - If you select SEASON, select the season to use.

Setting Up Schedules (continued)

ACTIVITIES Section

Similar to the rate rules ACTIONS, the Housekeeping Activities are a set of rules that occur when a specific set of conditions occur in the APPLY SCHEDULE TO section. Based on the conditions, the Housekeeping module can now schedule repeatable tasks to occur on Arrival Date, Departure Date or any of the days in between.



To create a new activity. . .

- Click on the HOUSEKEEPING tab.
- Click on the SETUP menu.
- Select the SCHEDULES option.
- From the Schedules Dashboard page, click on the NEW SCHEDULE button at the top right.
 - Or open an existing schedule to add the activity.
- In the Activities section of the Schedule, click on the NEW ACTIVITY button.

The ADD ACTIVITY pop up will appear, displaying two fields and two buttons.



Setting Up Schedules (continued)

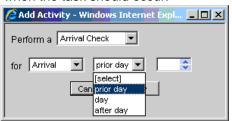
ACTIVITIES Section

- In the PERFORM A field, select the activity that should be performed as part of this schedule.
- In the FOR field, there are three options, ARRIVAL DURATION and DEPARTURE – select the option that meets your needs:



ARRIVAL: Select this option to schedule tasks that you would like to happen on or around the arrival date – For example (but not required), Inspection, Check In clean, Greeting Call, etc.

- When you select the ARRIVAL options, you are given the choice of when the task should occur.
 - PRIOR DAY
 - Select the number of days prior to the arrival.
 - DAY 0
 - Select this option for tasks occurring on the arrival date only.
 - AFTER DAY
 - Select the number of days after the arrival.



DURATION: Select this option if the action occurs on any day in between (but not including) the arrival and departure.

When you select the DURATION option, you must then set the number of days from the first duration day (Day one is arrival day) - For example: if the arrival day is Tuesday, the first duration day is Tuesday. If there is an arrival activity scheduled and a day one duration activity scheduled the day one activity would be ignored.



 Another example: If you set an activity to occur on DAY 3 of the duration, and the arrival day is WEDNESDAY,

the first day of the duration is Wednesday and the 3rd day of the duration is Friday.

DEPARTURE: select this option if the action occurs on the date of departure.

- Activities that occur on the departure day are similar to arrival day activities in that you select option to schedule tasks that you would like to happen on or around the departure date – For example (but not required), Inspection, Check Checkout clean,
- When you select the DEPARTURE options, you are given the choice of when the task should occur.
 - PRIOR DAY
 - Select the number of days prior to the departure.
 - DAY 0
 - Select this option for tasks occurring on the departure date only.
 - AFTER DAY
 - Select the number of days after the departure.



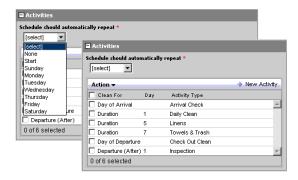
Common Activity Scenarios

Schedule Should Automatically Repeat

Housekeeping Tab > Setup Menu > Schedules > Activities

A Schedule's Activities occur in the following sequence: First, the schedule will perform the ARRIVAL tasks. Once the arrival tasks are completed, the schedule will perform the DURATION tasks, based on the scheduling there may be some repeat of the duration tasks. Once the duration tasks have been completed, the schedule will perform the DEPARTURE tasks. The system is so flexible that you can overlap the Arrival, Duration and Departure tasks. But Duration tasks are the only tasks that can repeat.

In the Activities section of the Housekeeping Schedule, the first field is labeled SCHEDULE SHOULD AUTOMATICALLY REPEAT. The drop down list for this field contains the days of the week, NONE and START. This field sets the Repeating option for the Duration Activities in the housekeeping schedule. Based on the option selected, the Schedule will repeat the Duration Activities on that day.



Repeating Options:

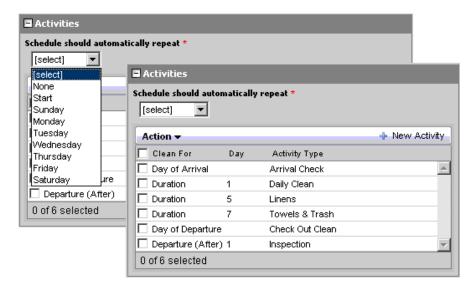
- NONE: No repeat option.
 - o The schedule will perform the Duration tasks once and not repeat.
- START: Repeat tasks on the date the Duration Activities start.
 - The schedule will perform the Duration tasks and repeat them on the day the Duration tasks started. So for example you have a ten day stay, and your scheduled activity has a duration of two, the activity will be done on the day after arrival and repeated every two days thereafter.
- DAY OF THE WEEK: Repeat the Duration schedule on the specified day of the week.
 - o This option will allow the duration tasks to repeat based on the day of the week.



Example Housekeeping Schedule

Example Housekeeping Schedule

Housekeeping Tab > Setup Menu > Schedules



The housekeeping schedule module is a flexible and robust tool for building housekeeping tasks. It allows you to create multiple combinations of Arrival, Duration and Departure tasks within a schedule. And you can create different schedules for different types of properties if you wish.

This section will walk through the steps of making simple schedules. To show how each task will relate to the next.

For this section, and for training purposes, we will assume that the Activity Types, Unit Types and Zones have already been created. This will allow us to focus on creating the Housekeeping Schedule.

The common steps for the scenario are as follows:

CREATING THE SCHEDULE:

- Go To: Housekeeping Tab > Setup Menu > Schedules.
- Click on the NEW SCHEDULE button.
- Fill in the NAME field.
- In the STATUS field, select ACTIVE.

Common Activity Scenario

One Arrival, One Duration, One Departure

Housekeeping Tab > Setup Menu > Schedules

This scenario will contain 1 arrival task, 1 duration task and 1 departure task. I have set the repeat to Start Date, so the tasks will repeat on the day after the arrival date.

Once you have done the basic common steps above, then, perform the following steps:

- In the APPLY SCHEDULE TO section, in the LENGTH OF STAY IS BETWEEN fields, enter lengths of stay if needed. For example, you may have different schedules for stays lasting 3, 7, or 30 days.
- In the ACTIVITIES sections, in the SCHEDULE SHOULD AUTOMATICALLY REPEAT field, select the START option.
 - o This will repeat the duration tasks on the first day after the check in date.

We will be creating three tasks in this example. The first task will be the ARRIVAL CHECK due on the guest arrival date. The second task will be the LINENS that will occur on Day 4 of a stay. The final task will be a CHECK OUT CLEAN that will occur the day of departure.

ARRIVAL TASK

- Click on the NEW ACTIVITY button at the far right.
- In the PERFORM A field, select the ARRIVAL CHECK.
- In the FOR field, select the ARRIVAL option.
- Click the APPLY button.

DURATION TASK

- Click on the NEW ACTIVITY button at the far right.
- In the PERFORM A field, select Linens.
- In the FOR field, select the Duration option. Then for day, put in 4.
- Click the APPLY button.



DEPARTURE TASK

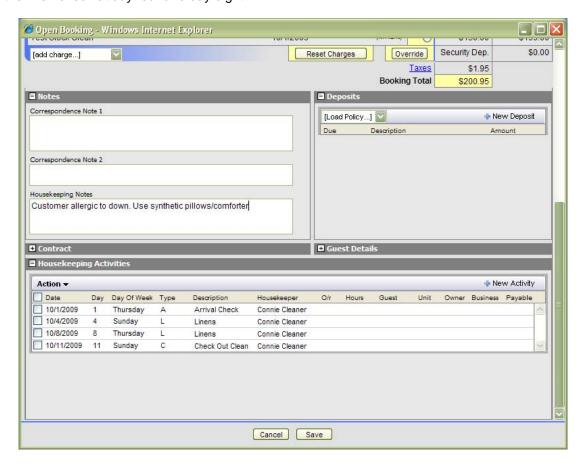
- Click on the NEW ACTIVITY button at the far right.
- In the PERFORM A field, select the Check Out Clean option.
- In the FOR field, select Departure and enter day.
- Click the APPLY button.

What we now have is a housekeeping schedule that schedules an arrival clean for the day of arrival, a linen service on the fourth and eighth day of the stay, and a departure clean the day of departure.

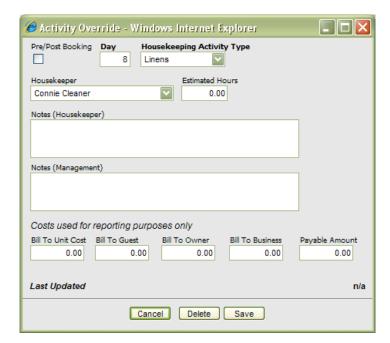
Housekeeping & Reservations

Editing or Adding Booking Housekeeping Schedules

If we set the schedule created above to have a scope of Business then each new reservation created will load this housekeeping schedule. To see the housekeeping schedule in the reservation go to the reservation and open the booking. Click the '+' next to Housekeeping Activities to see the schedule. The stay below is for ten nights so there is the linen check at day four and day eight.



To view any of the activities just highlight and click on it to open. You will then be able to modify the activity as needed:



If you wish to add a new activity, such a special cleaning requested by the guest you would click on New Activity and fill in the fields.

Additional Notes On Scheduling

If a unit is in multiple Unit Type Groups or Zones, we will pick the first Group to which the unit belongs based on the alphabetical sorting of the Group Name. I.e. if a Unit is in both "Group A" and "Group B" then we will treat this unit as though it only belongs to Group A.

If multiple schedules apply to a given unit, we will pick the schedule to use based on sorting the schedules by Shortest Length Of Stay (LOS) From Shortest LOS To Alphabetical Name

I.e. we are assuming that we should use the shortest schedule based on a LOS that fits.

Inactive schedules will be ignored when looking for schedules that apply.

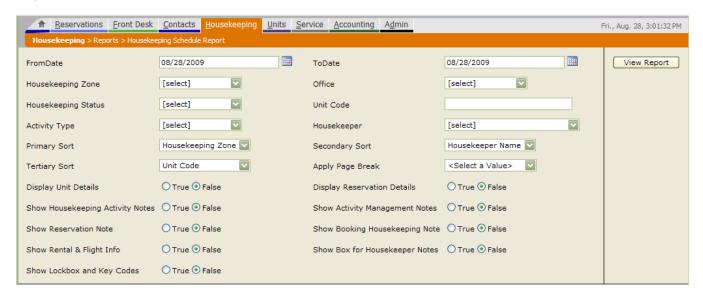
Schedule "Apply To" Dates are based on the Arrival Date of the stay.

Housekeeping Reports

Reports

Housekeeping Tab > Reports > Housekeeping Schedule Report

There are two new reports with the advanced housekeeping module. The first is the Housekeeping Schedule Report



To run the report enter the from/to dates and fill in the other settings as appropriate.

Housekeeping zone: if you have set up zones you can filter on a specific zone. Leave as [select] for all zones

Office: if you have more than one office you can filter for a specific one

Housekeeping Status: filter on a specific status if desired

Unit Code: You can run the report for a specific unit code

Activity Type: Run the report for a specific activity type

Housekeeper: filter on all or a specific housekeeper

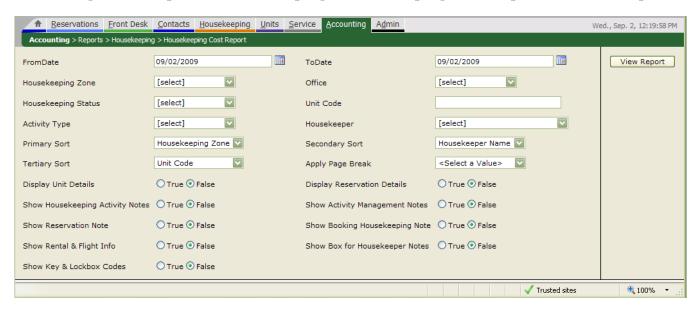
Primary, Secondary and Tertiary Sort: allows you to customize how you want the data sorted

Apply Page Break: determines where page breaks will occur. The appearance of the report will vary based on the number of options you choose and choosing where to put page breaks helps make the report more readable

For the remaining options mark True if you want to show the information, otherwise leave as False.

Reports

Accounting Tab > Reports > Housekeeping > Housekeeping Cost Report Schedule Report



The fields here are the same as the Housekeeping Schedule Report. If you elected to enter costs and hours for your activities then this report will display and sort them according to the filter options you have chosen.