



BUSINESS *plus* **ACCOUNTING**
HOTEL & PROPERTY MANAGEMENT

Quick Start Guide

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Initial System Startup

When you initially open the BPA software, you will be asked to enter your company information. At minimum, you should enter your company name. All other information can be entered later by going to Business System → Definitions → Companies → Modify.

Select A Company



Select The Company You Would Like To Work With

ID	Company Name
1	Paul's Wing Shack
2	The Rib Roost

Name: Paul's Wing Shack
Street: 334 Marshall Way
City: Layton
State: UT
Zip: 84041
Phone: (801)-336-3303
Fax: (801)-336-3313

Company ID:

Defining Employees

- As you initialize the software and begin to set things up there will be many operations that will require an employee to be defined, so to create an employee follow these simple steps, go to the **Touch Screen POS**→**POS Manager Functions**→**Define Employees**→**Add**. At minimum, you will want to fill out the following fields:
 - Employee # - This is a number that you will define for each employee. Most of our customers will use the last 4 digits of each employee's Social Security number for this field.
 - Last Name.
 - First Name.
 - Sale Person ID – When a sale is made in the software, this field will be printed on the customer receipt, indicating who made the sale. We recommend either entering the Employee number, or the first name of the employee.

Define Employees
EMPLOYEE #:

EMPLOYEES

Employee Information

Define Employee

Employee Information

Employee #: 5656 Telephone: () -
Last Name: Doe Telephone: () -
First Name: John Fax: () -
Sale Person ID: JOHN Position:
Street: Full/Part Time:
City: Allow Non-approved Clock Outs
State: Require Clock In To Access POS
Zip: Allow Cashout In Restaurant POS
Email:
Web Site:

Commissions

Use Commission Levels
Commission % on Sales:
Commission % on GPM:

Work History

Hire Date: / /

Pick-F8 Top Prev Next Bottom Find Print Save-F3 Cancel Delete Exit

Setting Up Your Front Desk

To setup your Front Desk, you should perform the following steps:

Defining Room Tabs Within The Front Desk.

All of your room information will need to be added to the system. This includes room numbers, pricing/rates, etc. First, you will want to adjust the Room Tabs on your Front Desk screen. You can have up to fourteen (14) different tabs on your Front Desk.

The screenshot displays the Front Desk interface. At the top, there are navigation buttons: Reports, Clerk Functions, Guest Data, Reservations & Check Ins, and Check Out. On the right, there is a date dropdown set to 09/04/2020, a Room: input field, and a Calendar button. Below these are room tabs: All Rooms, Queen, Double, Queen Queen, and Double Double. The Queen Queen tab is highlighted in red. The room grid shows the following rooms and their types:

All Rooms						
Queen		Double		Queen Queen		Double Double
104 D	105 D	106 D	107 D	108 Q	109 Q	110 Q
201 QQ	202 QQ	203 QQ	204 QQ	205 QQ	206 DD	207 DD
208 DD	209 DD	210 DD				

On the right side, there are three status indicators: Available (light blue), Booked (light red), and Occupied (light orange). At the bottom, there are control buttons: PgUp, PgDn, Open Drawer, Terminal Log In, Terminal Log Out, and Exit.

To **define Room Tabs**, perform the following steps:

1. Go to Hotel Management → Manager Functions → Assign Room Tab Names.
2. Change the menu names as needed.

Defining Room Types

The BPA Hotel and Property Management software allows you to define Room Types, each with specific rate. For example, you can have room types called King, Double, Queen, etc. Each of those room types can have different rates, such as High, Rack, and Discount. The system also allows you to define a Per Day Weekly Rate, and a Per Day Monthly Rate, for extended stay reservations.

To define Room Types, perform the following steps:

1. Go to Hotel Management → Manager Functions → Define Room Types.
2. Click the Add New Room Type button.
3. The following fields will need to be entered:
 - a. Room Type – This is an abbreviation of the room type you are entering. For example, for a “Double” room type, you can enter “D”.
 - b. Description – This is the full name of the room type. Using our “Double” example, you can enter “Double” in this field.
 - c. Multiple Guest Number – This is the number of guests that you allow on a multiple occupancy room before you will charge an extra guest fee.
 - d. Max Number of Guests – This is the maximum number of guests that you allow in this type of room.
 - e. Single Guest/Multiple Guests – Enter the price you will charge for each rate type (i.e. High1, High2, etc.).
 - f. Extra Guests/Weekend - Enter the extra charge that will be applied for Extra Guests/Weekend guests. For example, if you are charging \$5.00 extra for Weekend, High rate customers, enter “5.00” in the appropriate field.
 - g. Per Day Weekly/Monthly Rate – These rates are used for extended stay reservations.
4. To save the room type, press the Next, Previous, or Exit button.

Room Type
✖

Room Type:

Description:

Multiple Guest Number:

Max Number of Guests:

	High 1	High 2	Rack	Discount 1	Discount 2	Discount 3	Discount 4
Single Guest:	60.00	55.00	50.00	0.00	0.00	0.00	0.00
Multiple Guests:	60.00	55.00	50.00	0.00	0.00	0.00	0.00
Extra Guests:	5.00	5.00	5.00	0.00	0.00	0.00	0.00
WeekEnd +/- :	5.00	5.00	5.00	0.00	0.00	0.00	0.00

Per Day Weekly Rate:

Per Day Monthly Rate:

Defining Rooms

After defining your room types, you will then define each room and assign room types to those rooms. To do this, perform the following steps:

1. Go to Hotel Management → Manager Functions → Define Rooms.
2. Click the Add New Room button.
3. The following fields will need to be entered:
 - a. Room Number – This the room number of the room you are adding.
 - b. Room Type – This assigns the room as a King, Double, Queen, etc. room type. Press the Pick button to view a list of room types.
 - c. Active – This allows you to mark the room as Active or Inactive. Enter Y for Active...N for Inactive.
4. To save the room type, press the Next, Previous, or Exit button.

	High 1	High 2	Rack	Discount 1	Discount 2	Discount 3	Discount 4
Single Guest:	60.00	55.00	50.00	0.00	0.00	0.00	0.00
Multiple Guests:	60.00	55.00	50.00	0.00	0.00	0.00	0.00
Extra Guests:	5.00	5.00	5.00	0.00	0.00	0.00	0.00
WeekEnd +/- :	5.00	5.00	5.00	0.00	0.00	0.00	0.00

Weekly Rate: 40.00
Monthly Rate: 30.00

Room Notes:

Buttons: Previous, Next, Add New Room, Delete Room, View Rooms, Exit

Assigning Rooms to Tabs

After all rooms have been defined and assigned a room type, you will now need to assign those rooms to tabs on your Front Desk screen.

Note: This function must be performed if any changes are made to your rooms (i.e. adding new rooms using the Define Rooms function).

To Assign Rooms to Tabs, perform the following steps:

1. Go to Hotel Management → Manager Functions → Assign Rooms to Tabs.
2. The following fields need to be entered:
 - a. Pick Tab – Enter the tab from your Front Desk screen that you would like to adjust. For a list of tabs, press the Pick button next to this field.
 - b. Pick Room Type – Select the room type that you would like to be assigned to this tab. For a list of Room Types, press the Pick button next to this field.
3. Press the Add Rooms to Tab button when finished.

Assign Rooms To Tabs Using Room Type

Pick Tab:

Pick Room Type:

Adding Sales Tax

To enter your sales tax percentage, perform the following steps:

1. Go to Business System→Definitions→Sales Tax Table.
2. Under Tax Code 1, enter your City, State, and Tax Rate.
3. Press Save and Exit when finished.

Define Sales Tax Rates

Customer Sales Tax Rates | **Product Tax Reporting Groups**

When customers are defined they are given a sales tax table number. That table number corresponds to a sales tax rate. All customers given the same table number will have the same sales tax rate.

Use this screen to assign tax rates to the tax table numbers. To change a sales tax rate for a group of customers you only have to change the rate in the tax table. For exempt customers create a 0.0 tax rate.

If you have products that should be charged at a different rate from your standard sales tax rate, you can specify their tax unique tax rate using product definitions.

Sales Tax

TAX CODE	CITY - COUNTY	STATE	TAXRATE
1	Your City	UT	6.0000
2			0.0000
3			0.0000
4			0.0000
5			0.0000
6			0.0000
7			0.0000

Sales Tax name to print on invoices:

Minimum Sales Amount for Sales Tax In Restaurant POS (If Applicable):

GST Tax

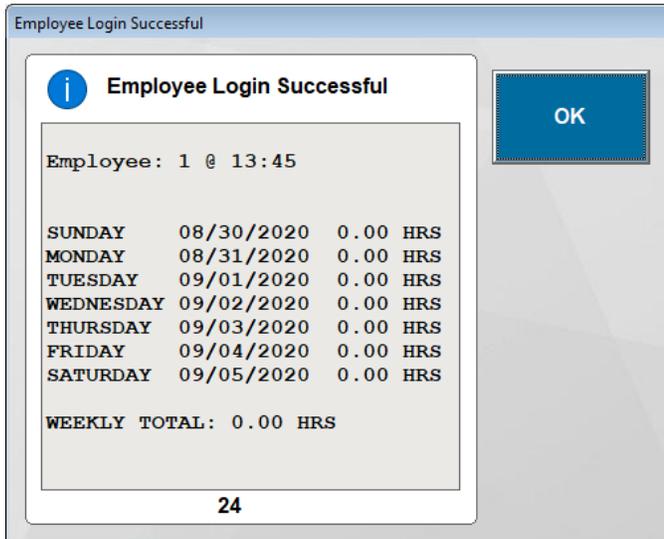
Goods And Services Tax Rate (Used In Canada):

Goods & Services Tax name to print on invoices:

Clocking In and Out of the Time Clock

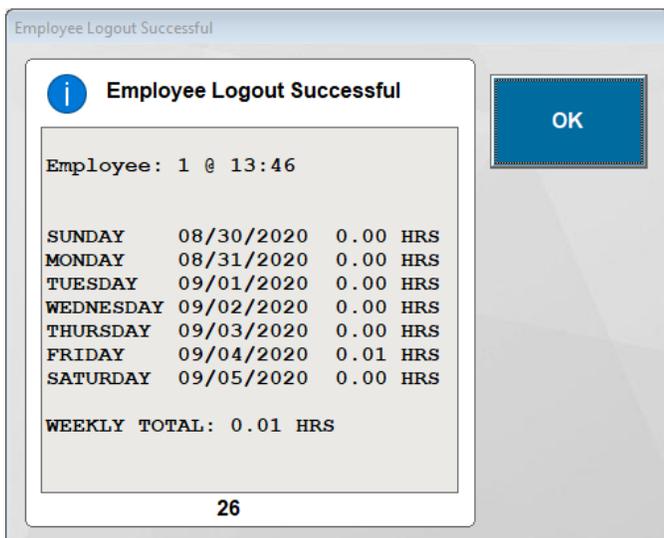
Before you can perform sales in the system, you must be clocked into the time clock. To clock in, perform the following steps:

1. Go to Hotel Management→Employee Time Clock→Employee Clock In.
2. Enter the employee number you wish to clock in, then press OK.
3. You should now receive a message that says “Employee Login Successful.”



At the end of the day, to clock out of the time clock, perform the following steps:

1. Go to Hotel Management→Employee Time Clock→Employee Clock Out.
2. Enter the employee number you wish to clock out, then press OK.
3. You should now receive a message that says “Employee Logout Successful.”



How to Create a Reservation

Once you have created an employee, and you have added rooms to your Front Desk, you can begin creating reservations in the system. Remember, you must be logged into the time clock to create reservations.

To create a reservation, perform the following steps:

1. Go to Hotel Management → Front Desk.
2. An Employee Log In screen will appear. Enter your employee number, and then press OK.
3. You will then see your Front Desk screen with all of your rooms. Rooms in **Green** are Available. Rooms in **Yellow** are Occupied...and rooms in **Pink** are Booked. To create a new reservation, click Reservations & Check Ins button.
4. In the Reservations and Check Ins screen, the following fields need to be entered:
 - a. Acct/Phone Number – Each time a reservation is made, the system will store that customer's information for future use. In this field, enter an account number or the customer's phone number.
 - b. Last, First (Name).
 - c. Phone.
 - d. Address.
 - e. Fill out the following information in the **Book a Room** section:
 - i. Arrival Date.
 - ii. Room Type – Use the drop down menu to select the appropriate room type.
 - iii. Number of Days – This is the number of days the customer will be staying.
 - iv. # of Guests – This is the number of guests staying in the room.
 - v. Room Number – Enter the room number you are creating the reservation for. To view a list of rooms, press the Pick button.
 - vi. Rate Type – Select the appropriate rate type for this reservation.
 - f. At this point, you can book the room by clicking the Book Room button.
 - g. When the customer arrives, you can click the Check In Room button.

The screenshot displays the 'Guest Reservations' software interface. It is divided into several sections:

- Guest Reservation Information:** Includes fields for Confirmation # (55305497), Acct/Phone (555555555), Last, First (Doe, John), Phone, Address (111 Main Street), City (Anytown), State (UT), Zip (84405), Country (USA), Email (doe.john@email.com), and Birth Date (01/01/1979).
- Guest Credit Card & Guest Identification:** (Empty fields)
- Reserved Rooms:** A table with columns: Room Type, Room, Date, # Days, Price. One row is visible: Room Type 'D', Room '104', Date '09/04/2020', # Days '3', Price '171.20'.
- Available Rooms:** A table with columns: Room Type, Avail. For date 09/04/2020, it lists room types and their availability: D (3), DD (5), DDNS (0), DNS (0), K (4), KK (0), KKNS (0), KNS (0), Q (3).
- Book a Room:** Includes fields for Arrival Date (09/04/2020, FRI) To (09/07/2020, MON), Room Type (D), Rate Type (RACK), Number of Days (3), # of Guests (2), and Room Number. It also shows Day Rate (50.00), Wk End Rate (55.00), and Room Total (171.20).
- Summary:** Sub Total (160.00), Taxes (11.20), Total (171.20), Paid (171.20), Net Due (0.00).
- Buttons:** Room Check In, Cancel a Room, Pre-Pay Room, Pre-Pay All Rooms, Pick Room, Book Room, New Reservation, Load Reservation, Cancel Reservation, Print Reservation, Exit.

How to Check Out a Room

To check out a room, perform the following steps:

1. Go to Hotel Management → Front Desk.
2. Click the Check Out button.
3. Press the Load Folio button, and select the folio you want to check out.
4. Press the Check Out Room button.

5. You will next be presented with the Cash Out screen.
6. Using the number pad, type in the amount that the customer is giving you. For example, if the customer gave you a \$200, then enter "200.00."
7. Press the appropriate payment type button. For example, if the customer gave you cash, click the Cash button
8. Press Cash Out.

If you have any other questions, feel free to give us a call at 801-336-3303.