

Free Trial Guide



Guest management



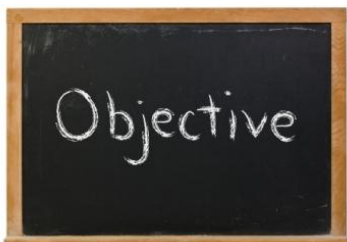
[Guide - Estimated time 30 min]

- Data for use
- Guest Card
- Customer Extract



[Before Start - You need]

- You need to have Free trial ID
- Address your issues for CRM process (Check with our solution)
- Basic (Navigation, Setup guide) operation



[Goals - What should we learn from this?]

- Understand Omotenashi CRM functions
- Understand the benefit
- More queries - where should we go?

1. Data in this guide

The following data is available in this trial environment. Please use these data in your trial.

(Available Data)



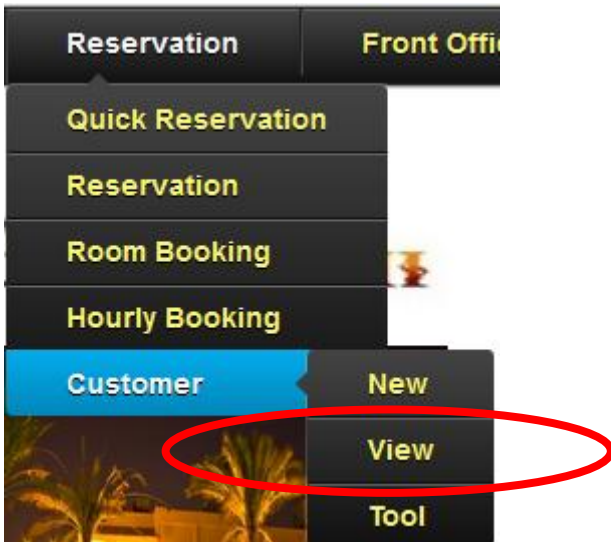
- Hotel : Omotenashi India
- Guest : Naveen , Gabrani (more others 100)
- Rate Plan : Rack rate / Standard or Deluxe
- Room : Standard (101-110) , Deluxe (201-210)
- Reservation Period : no Limitation
- Currency : USD
- Selectable Language (as of Sep 2014) : English, Japanese, Chinese

2. Quick Reservation

1) Navigation

You can navigate to guest list page from the Menu bar as follows:

Reservation → Customer → View



Shows following page.(Guest List)

Actions	Account Name	Customer No	Billing zip Postal Code	Billing city	Billing StateProvince	Billing Street	Billing country	Phone	Fax
<input type="checkbox"/> Edit View	Naveen, Gabrani	0000104	110031	New Delhi	Delhi		India	123456789	
<input type="checkbox"/> Edit View	Acme		31349	New York	NY	10 Main Rd.	USA	(212) 555-5555	(212) 555-5555
<input type="checkbox"/> Edit View	salesforce.com		94105	San Francisco	CA	The Landmark @ One Market, Suite 300	USA	(415) 901-7000	(415) 901-7040
<input type="checkbox"/> Edit View	Global Media		L4B 1Y3	Toronto	Ontario	150 Chestnut Street	Canada	(905) 555-1212	
<input type="checkbox"/> Edit View	Christopher Columbus	0000021	10001	NYC	NY	NYC 1251	USA	1-800-111-1128	1-800-222-1128
<input type="checkbox"/> Edit View	George Orwell?	0000022	10001	NYC	NY	NYC 1252	USA	1-800-111-1129	1-800-222-1129
<input type="checkbox"/> Edit View	Queen Elizabeth	0000023	10001	NYC	NY	NYC 1253	USA	1-800-111-1130	1-800-222-1130
<input type="checkbox"/> Edit View	Queen Victoria	0000024	10001	NYC	NY	NYC 1254	USA	1-800-111-1131	1-800-222-1131
<input type="checkbox"/> Edit View	Britt Wolf	0000025	10001	NYC	NY	NYC 1255	USA	1-800-111-1132	1-800-222-1132
<input type="checkbox"/> Edit View	Buddy Mile	0000026	10001	NYC	NY	NYC 1256	USA	1-800-111-1133	1-800-222-1133
<input type="checkbox"/> Edit View	Buddy Salt	0000027	10001	NYC	NY	NYC 1257	USA	1-800-111-1134	1-800-222-1134
<input type="checkbox"/> Edit View	Budgie (Si	0000028	10001	NYC	NY	NYC 1258	USA	1-800-111-1135	1-800-222-1135
<input type="checkbox"/> Edit View	Bun E Carl	0000029	10001	NYC	NY	NYC 1259	USA	1-800-111-1136	1-800-222-1136
<input type="checkbox"/> Edit View	Casey Gril	0000030	10001	NYC	NY	NYC 1260	USA	1-800-111-1137	1-800-222-1137
<input type="checkbox"/> Edit View	Cesar Zuid	0000031	10001	NYC	NY	NYC 1261	USA	1-800-111-1138	1-800-222-1138
<input type="checkbox"/> Edit View	George Orwell1?	0000032	10001	NYC	NY	NYC 1262	USA	1-800-111-1139	1-800-222-1139
<input type="checkbox"/> Edit View	Queen Elizabeth1	0000033	10001	NYC	NY	NYC 1263	USA	1-800-111-1140	1-800-222-1140
<input type="checkbox"/> Edit View	Leonardo da Vinci?	0000034	10001	NYC	NY	NYC 1264	USA	1-800-111-1141	1-800-222-1141
<input type="checkbox"/> Edit View	Chad Sexto	0000035	10001	NYC	NY	NYC 1265	USA	1-800-111-1142	1-800-222-1142
<input type="checkbox"/> Edit View	Charlie Al	0000036	10001	NYC	NY	NYC 1266	USA	1-800-111-1143	1-800-222-1143

2) How to use

Let's follow the functions of guest information record.

Step 1 : Find guest and view.

There is several way to find guest. (Global search, Salesforce account, Customer view). Will use customer view on this guide.

Enter the key work on search criteria.

Name	column	Postal Code		Phone		Customer No		Query
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Once agree with this, click "Query" and result will follow. It shows 1 candidate in this example. Select your desired and click view.


Actions	Account Name	Customer No	Billing zip Postal Code	Billing city	Billing StateProvince	Billing Street	Billing country	Phone	Fax
<input type="checkbox"/> View	Christopher Columbus	0000021	10001	NYC	NY	NYC 1251	USA	1-800-111-1128	1-800-222-1128

« Previous Next »

Step 2 : Confirm detail

View will show following page.


Customize Page | Printable View | Help for this Page ?

 **Christopher Columbus**

[Show Feed](#)

Family (2) | [GuestQuery \(1\)](#) | [GuestClaim \(0\)](#) | [Transaction \(1\)](#) | [Folios \(1\)](#) | [Open Activities \(0\)](#) | [Activity History \(0\)](#) | [Notes & Attachments \(0\)](#)

Account Detail Edit Delete Sharing


Salutation	Mr.		
Guest Name	Christopher Columbus View Hierarchy	Gender	Male
Last_Name	Lincoln	Nick Name	
First_Name	Christopher	Parent Account	
CustomerNumber	0000021		
CompanyName	Toyota		
recent point	8		
Quick Reservation			

Description Information

Birthday	12/1/1910
Age	103
Description	
Attention	Loud
Omotenashi_Point	-Love suites -2 Dogs -Prefer financial market

Address Information

Billing Address	NYC 1251 NYC, NY 10001 USA
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Step 3 : Use guest card function (Confirm guest information)

This page has several functions. Let's start with guest information.

The primary page will show the guest information. This is composed with following sections.

- Detail
- Description
- Address
- Anniversary
- Preference
- Contact information

Go to each sections and you can confirm what you are looking forward.

Here, let's us show you the address information.

Scroll and find address section. Page will show in below. You can check address detail and confirm the locations in google map.

▼ Address Information

Billing Address NYC 1251
NYC, NY 10001
USA



Step 4 : Extend to use of floating menu

Guest card becomes a big list in order to support big data. The floating menu is quick views for related information along with guest. Just move mouse hover and it will show the quick view of data which is selected.



Christopher Columbus



[Customize Page](#) | [Printable View](#) | [Help for this Page](#)

Show Feed

[Family \[2\]](#) | [GuestQuery \[1\]](#) | [GuestClaim \[0\]](#) | [Transaction \[1\]](#) | [Folios \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

GuestQuery

[New GuestQuery](#)

Action	Query_Date	Query Name	Query_Detail	Query_Type	Nights	Pax	RoomType	Staff_Response	Input_Date	Created By
Edit Del	9/8/2014	Q-140900000	The Web site photo shows deluxe room. Got suggestion to exchange.	Suggestion			Standard		9/8/2014	Hironori Hosoe, 9/8/2014 5:58 PM

First_Name Christopher

Parent Account

CustomerNumber 0000021

CompanyName Toyota

recent point 8

Quick Reservation

(Tips)



Guest Card

1. Find guest : Global search(Top Search Box), Application menu>Customer>View, Salesforce Account
2. Reference Link : Many of pages links to guest information. If it shows guest name with under line, this is reference link. Click it and page will open the guest card on another tab.
(Reference link page)
Reservation, Folio Manager, Views(Stay View, Stay Ledger view, Hourly Booking), Hosekeeping, Check-in, Checkout, Cash Center, Cash Application etc

3. Floating Menu : Floating menu can make new entry and edit entry not only for view. Click edit in left hand side will open edit form and new will open new entry form.

GuestQuery				New GuestQuery
Action	Query_Date	Query Name	Query_Detail	
Edit Del	9/8/ 014	Q-140900000	The Web site photo shows deluxe room. Got suggestion to exchange.	

4. Reservation entry : It does not need to go to reservation menu and you can directly move reservation from here. When you find this icon in detail information section, click it and it will make new reservation form in another window. Off course, it does not need to fill guest name and automatically populated.

Quick Reservation

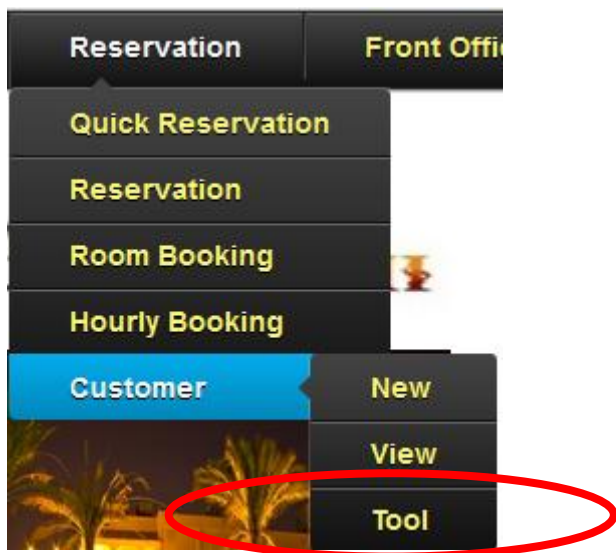


3. Customer extract

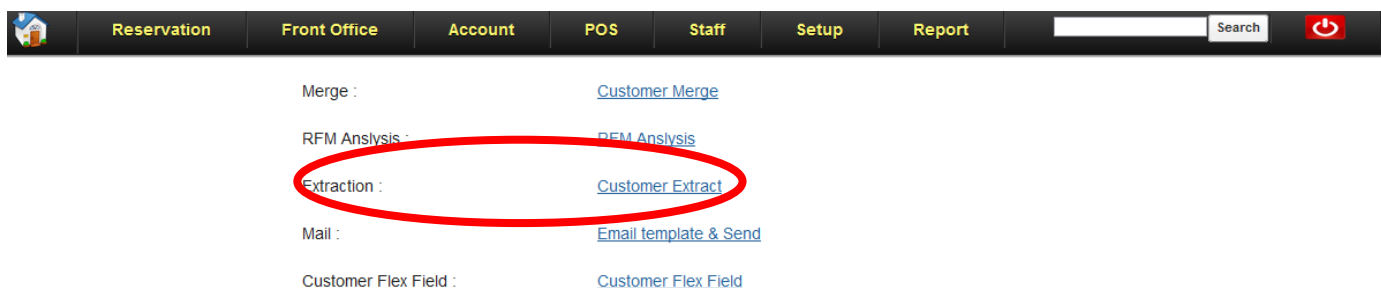
1) Navigation

You can navigate to guest list page from the Menu bar as follows:

Reservation → Customer → Tools → Customer Extract



Tools menu.



2) How to use

Customer extract page will show in below. You can put any of key word in input field and click extract guest which has criteria with your finding.

--None--
 - -
 -

Actions	Account Name	Customer No.	Postal code	City	State Province	Street	Country	Phone	Fax
<input type="checkbox"/> Edit View	Naveen, Gabrani	0000104	110031	New Delhi	Delhi		India	123456789	
<input type="checkbox"/> Edit View	Acme		31349	New York	NY	10 Main Rd.	USA	(212) 555-5555	(212) 555-5555
<input type="checkbox"/> Edit View	salesforce.com		94105	San Francisco	CA	The Landmark @ One Market, Suite 300	USA	(415) 901-7000	(415) 901-7040
<input type="checkbox"/> Edit View	Global Media		L4B 1Y3	Toronto	Ontario	150 Chestnut Street	Canada	(905) 555-1212	
<input type="checkbox"/> Edit View	Christopher Columbus	0000021	10001	NYC	NY	NYC 1251	USA	1-800-111-1128	1-800-222-1128
<input type="checkbox"/> Edit View	George Orwell?	0000022	10001	NYC	NY	NYC 1252	USA	1-800-111-1129	1-800-222-1129
<input type="checkbox"/> Edit View	Queen Elizabeth	0000023	10001	NYC	NY	NYC 1253	USA	1-800-111-1130	1-800-222-1130
<input type="checkbox"/> Edit View	Queen Victoria	0000024	10001	NYC	NY	NYC 1254	USA	1-800-111-1131	1-800-222-1131
<input type="checkbox"/> Edit View	Britt Walf	0000025	10001	NYC	NY	NYC 1255	USA	1-800-111-1132	1-800-222-1132

Let's take a example of Age selection.
Put criteria in age fields and click query.

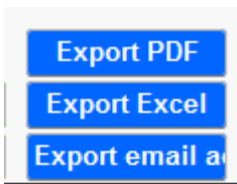
Age -

Then query result will show in below

(Query Result)

Actions	Account Name	Customer No.	Postal code	City	StateProvince	Street	Country	Phone	Fax
<input type="checkbox"/> Edit View	Edward G. Robinson	0000097	110003	Delhi	DL	Delhi 1278	India	91-111-1234611	91-222-1234611
<input type="checkbox"/> Edit View	William Holden	0000098	110003	Delhi	DL	Delhi 1279	India	91-111-1234612	91-222-1234612
<input type="checkbox"/> Edit View	Katharine Hepburn	0000099	110003	Delhi	DL	Delhi 1280	India	91-111-1234613	91-222-1234613
<input type="checkbox"/> Edit View	Bette Davis	0000100	110003	Delhi	DL	Delhi 1281	India	91-111-1234614	91-222-1234614
<input type="checkbox"/> Edit View	Barack Obama	0000101	110003	Delhi	DL	Delhi 1282	India	91-111-1234615	91-222-1234615
<input type="checkbox"/> Edit View	Peter Sellers?	0000102	110003	Delhi	DL	Delhi 1283	India	91-111-1234616	91-222-1234616
<input type="checkbox"/> Edit View	Audrey Hepburn	0000103	110003	Delhi	DL	Delhi 1284	India	91-111-1234617	91-222-1234617
<input type="checkbox"/> Edit View	Naveen, Gabrani	0000104	110031	New Delhi	Delhi		India	123456789	

Also, click right had side buttons and you can download with your preferred file format for this query result.



(Tips)



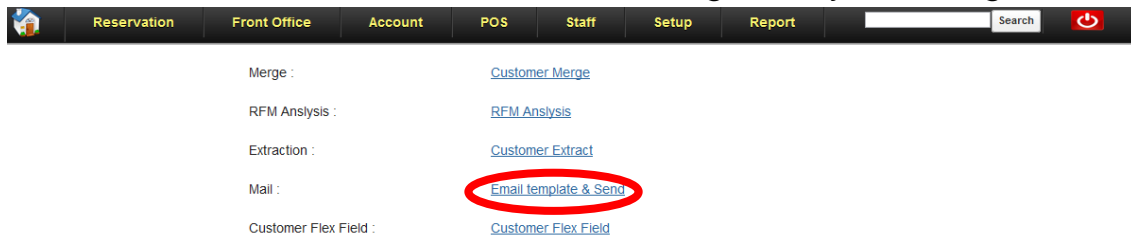
CRM Tools

1. CTI (Optional)

When get call from guest, system will search guest with caller id and find and show guest list. This will take 1-2 sec and improve guest reservation process. Off course, you can directly book reservation from this search result.

2. Mass email

In customer extract, you can download the guest list with email address format. Using this will help sending mass email. You can select the guest with your preference and export as email address format. Save result in your local computer and you can read this file in mass email tool. Mass email will be navigated by following.



3. RFM analysis

R(Recently) , F(Frequency), M(Monetary) is famous CRM analysis method. The Omotenashi can set your RFM points and evaluate customer daily basis. Off course, you can use this RFM analysis result and can use for any promotion purpose. Setup can be navigated with tool menu.



4. Summary

In this guide, you learnt follows.



- How to find and view your guest.
- How to make actions for your guest.
- Varieties of CRM tools.

You also learnt “How easy to make these in THE OMOTENASHI.

If you want to more detail,

- Click website(<http://www.omotenashi-pms.com>) and go to support.
- Download Quick reservation, Reservation manuals.

If you have any question about this guide, please contact to us.

support@omotenashi-pms.com

