Copyright

Copyright ©2006, Radiant Systems, Inc. The information contained in this publication is confidential and proprietary. No part of this document may be reproduced, disclosed to others, transmitted, stored in a retrieval system, or translated into any language, in any form, by any means, without written permission of Radiant Systems, Inc.

Radiant Systems, Inc. is not responsible for any technical inaccuracies or typographical errors contained in this publication. Changes are periodically made to the information herein; these changes will be incorporated in new editions of this publication. Any reference to gender in this document is not meant to be discriminatory. The software described in this document is provided under a license agreement. The software may be used or copied only in accordance with the terms of that agreement.

© Radiant Systems, Inc., 2006. All Rights Reserved. ALOHA® is a U.S. Registered Trademark of Radiant Systems, Inc. Microsoft®, and Windows® are registered trademarks of Microsoft, Inc. IBM® is a registered trademark of International Business Machines Corporation. Other products mentioned are trademarks or registered trademarks of their respective companies.
Table of Contents

Introduction

Configuring Aloha PMS ........................................................................... 1-1
  Interfacing PMS with the Aloha System ................................................ 1-4
  Assigning PMS Categories .................................................................... 1-6
  Configuring a Room Service Tender .................................................... 1-9
  Configuring a PMS Comp ..................................................................... 1-16
  Providing the Ability to Approve PMS Offline Posting ....................... 1-18
  Configuring a Room Service Order Mode ......................................... 1-20
  Enabling Inquiries with PMS .............................................................. 1-24
  Printing PMS Information on Guest Checks ..................................... 1-29
  Other POS Features for PMS Operations ......................................... 1-32
  Defining PMS Parameters in EDC ...................................................... 1-33

Using Aloha PMS ..................................................................................... 2-1
  Performing FOH Operations in QuickService .................................. 2-4
    Applying a Room Service Order Mode ........................................... 2-4
    Charging an Order to a Guest ....................................................... 2-6
    Inquiring a Guest Account ........................................................... 2-10
  Performing FOH Operations in TableService .................................. 2-12
    Starting a Check with PMS .......................................................... 2-12
    Applying a Room Service Order Mode ........................................ 2-13
    Charging an Order to a Guest ..................................................... 2-15
    Performing a PMS Inquiry .......................................................... 2-18
  Handling Offline PMS Transactions ................................................ 2-21
  Performing PMS Functions from the BOH ....................................... 2-23
    Posting a Charge from the BOH ................................................ 2-23
    Inquiring a Guest Status from the BOH ....................................... 2-25
Adjusting a Charge from the BOH ............................................... 2-26
Deleting a Charge from the BOH ................................................ 2-27
Troubleshooting PMS ..................................................................... 2-29
Viewing the Debug Log ................................................................. 2-29
Viewing the Charge Report ............................................................ 2-30

Index
Introduction

What Aloha PMS Interface Does

Aloha PMS Interface provides integration between the Aloha TableService or QuickService system and a hotel’s Property Management System (PMS). As an add-on to the Aloha system, Aloha PMS Interface instantly gives hotels essential information to provide guests with more consistent and gratifying service.

You can use Aloha PMS Interface to:

- Charge purchases to a guest's account.
- View residence status and charging privileges of guests.
- Easily manage and maintain room service orders with additional flat and percentage fees, and automatic or manual gratuity.
- Print guest and room information on the guest check.

It meets specific requirements of the hotel environment and gives hotels the immediate ability to close a check to a guest’s individual account.

What is a Property Management System?

A property management system is an orderly open-item, unit control, accounting system designed to organize and manage accounting concepts of rooms and restaurant areas.
Benefits of a PMS include:

- Increases cash flow and prevention of lost income.
- Provides daily, weekly, and monthly accounting controls.
- Reduces heavy end-of-month/beginning-of-month workloads.
- Eliminates posting errors and maintains accurate records.

The hotel industry is a 24-hour multi-million dollar operation. To compete in the hospitality technology market, you must have an automated approach to aiding night audits and charging purchases to a guest’s account. Aloha currently integrates with 10 PMS systems and you can use Aloha PMS Interface with either the TableService or QuickService product.

**How Can Aloha PMS Interface Improve Customer Service?**

In a hotel environment, customer service is the backbone of a successful establishment. Guests are usually from out of town and exceptional service traditionally brings them back. With Aloha PMS Interface, guests can easily charge orders to their room account whether they are in the bar, restaurant, or in their room. Furthermore, accounting personnel will save hours of labor each week.

**What You Need to Know about Aloha PMS Interface**

The creation of a well-defined and functional database on the POS side is imperative when using Aloha PMS Interface. You can control the interface to accommodate the restaurant by using various sets of menus for the restaurant, bar, and room service. Furthermore, most hotels charge different rates, depending on where you order the item. For example, hotels normally charge 10-15 percent higher for a restaurant item when ordered through room service. You may also add a delivery fee to room service items. Various server menus may require multiple job codes, job groups, and regular events.

The hotel environment commonly has non-taxed items, such as room rental for banquet functions, and certain amenities. You can track amenity items for their cost in the database, even though you do not charge them to the guest.

The Aloha system and the PMS system require you to define revenue centers correctly in both products. Revenue centers must match exactly, and you cannot change the information once it is in use. If the revenue centers on both systems are not identical, the information reports incorrectly when sent to the PMS program.
Conventions Used in This Guide

Numerous graphics and instructions appear throughout this guide. These conventions make it easy to find and understand information.

Symbols and Alerts

The following graphic symbols alert you to important points throughout this guide:

- **Notes**
  
  Highlights a special point of interest about the topic under discussion.

- **CAUTION**
  
  Alerts you that the operation being described can cause problems if you are not careful.

- **Book**
  
  Directs you to a more complete discussion in another chapter of the current guide, or other reference material.

- **Light Bulb**
  
  Points to a useful hint that may save you time or trouble.
How This Guide is Organized

This guide is designed to help you quickly get familiar with Aloha PMS Interface. It is organized as follows:

Chapter 1: Configuring Aloha PMS

This chapter explains the setup requirements and procedures for both QuickService and TableService to enable the Aloha PMS Interface.

Chapter 2: Using Aloha PMS

This chapter discusses the vital elements and the various messages associated with the Aloha PMS Interface. Gratuity and room service fees can be applied to a check which can be charged to the guest’s account. Employees become familiar with the procedures of ordering and posting charges if the PMS is down.

Index
Chapter 1

Configuring Aloha PMS

This chapter discusses the setup requirements and procedures for the Hotel Interface program, such as defining order modes, tenders, categories, and other database elements to meet the requirements of a hotel's Property Management System.

Interfacing PMS with the Aloha System ........................................... 1-2
Assigning PMS Categories ......................................................... 1-4
Configuring a Room Service Tender ............................................. 1-7
Configuring a PMS Comp ............................................................ 1-14
Providing the Ability to Approve PMS Offline Posting ............... 1-16
Configuring a Room Service Order Mode ................................. 1-18
Enabling Inquiries with PMS ...................................................... 1-22
Printing PMS Information on Guest Checks ............................. 1-27
Other POS Features for PMS Operations ................................. 1-30
Defining PMS Parameters in EDC .............................................. 1-31
This chapter discusses, in detail, the setup requirements for the Aloha PMS Interface. In this section you learn how to:

- Define the property management system to use.
- Create the PMS Tender ID and tender button for use in FOH.
- Create the PMS Inquire button for QuickService installations.
- Set up room service/auto gratuity charges.
- Define PMS sales and retail categories.
- Set up guest check print settings for PMS information.
- Customize the Tip and Room # lines for the guest check.
- Establish the settings for use in Aloha EDC.

The Aloha PMS Interface add-on provides an important link between the Aloha system and the PMS system of the hotel. Through proper setup, use the PMS system to verify the registration of a guest and charging privileges, apply charges to the guest or separate guests in the same room, and assist hotel accounting personnel in tracking charges posted each day.

This chapter is broken down into separate sections of setup procedures for the Aloha QuickService, Aloha TableService, and Aloha EDC product. Please refer to the section pertaining to the product installed at your location. You must log in to the appropriate product and have security key access to PMS Interface to perform the procedures in this chapter.
Interfacing PMS with the Aloha System

The Aloha PMS Interface program provides a method to interact with the hotel's Property Management System. To utilize the PMS functionality, the system requires necessary settings found in Maintenance > Store Settings.

Refer to the Aloha QuickService and TableService Reference Guides for more information on Aloha Manager.

To enable PMS:

1. Select Maintenance > Store Settings > Hotel group. The Property Management System (PMS) tab appears. See Figure 1-1 for QuickService. See Figure 1-2 for TableService.

![Figure 1-1 QuickService Store Settings - Hotel Group](image-url)
2. Select **Use Property Management System (PMS)** to enable the PMS interface and activate the remaining options on the tab.

3. Select the **PMS type** from the drop-down list. Aloha currently supports the following property management systems:

   - Aloha Hotel Manager
   - CSS
   - Encore
   - Fastech Meal Accountability
   - Fidelio
   - Generic Micros 4700
   - HIS
   - HIS Preauth
   - Marriott
   - RDP
   - Springer Miller

---

*Figure 1-2 TableService Store Settings - Hotel Group*
If you select Fastech as your PMS vendor, the PMS response text prints on the guest check. The PMS response contains the new account balance, including all current guest checks.

4. Type the number of **PMS Sales categories** you are using to report sales. You can use up to 16 PMS sales categories.

5. Type the **number of seconds**, with 30 minutes as the default, to wait for a response from the PMS system. A value for the PMS Timeout.

6. Type a **number of seconds** in which you want the Aloha system to wait before renaming the .req (request) file. A value in ‘REQ Timeout.’ For each transaction requiring a PMS authorization, the Aloha POS system sends an .req file to the PMS, via the EDC program. When the PMS responds, the .req file is renamed to an .ans file. There may be instances when the time it takes for EDC to send the .req file to the PMS and for the PMS to respond, the FOH could time out and return to the floating logo, subsequently placing the transaction in limbo. In general, the PMS timeout added with the .req timeout should not exceed the FOH timeout on the POS system. The PMS timeout starts after the PMS picks up the .req file or the .req timeout lapses.

7. Type the **number of voucher copies** to print. This setting controls the number of vouchers to print when you make adjustments or authorizations to the PMS payment, but not when you delete a PMS payment.

8. Select **Report Revenue Center Sales from where check originated**, if desired. Sales for the check are reported under the revenue center which the sale originated. For example, if a check originates in the bar and is later transferred to the dining room, the sales for the check report under the bar revenue center.

9. Select the **printer** to use for offline processing when the POS cannot connect to the PMS system.

10. Click **Save** and close the **Store Settings** function.

### Assigning PMS Categories

You must specify up to 16 sales and retail categories to correspond with the categories used by the PMS of the hotel. These PMS categories allow you to automatically break down guest check totals properly in the FOH for reporting. Assign each category to the correct PMS sales category number. If not, the transactions with these items will not post to the hotel’s property management system. Some PMS systems pull only the ‘total charge’ and require only one category. In some systems, defining more than the one category can cause the ‘PMS Categories not defined correctly’ error.
Usually, categories have been previously defined for other purposes. The property management system uses these same categories. The following procedure includes the required or suggested settings. We do not discuss other settings on the Categories function tab.

To assign PMS categories:

1. Select Maintenance > Menu > Categories. The Categories function tab appears. See Figure 1-3 for QuickService. See Figure 1-4 for TableService.

![Figure 1-3 QuickService Categories Function](image-url)
2. Select a **sales** or **retail category** from the ‘Category’ drop-down list.

3. Enter a **number** between 1 and 4 in the ‘PMS Sales Cat’ text box. PMS Sales categories are set up on the hotel’s property management system when you define the interface. Most property management systems use the following categories: 1-Food, 2-Liquor, 3-Beer, and 4-Wine. Depending upon how the information is captured, the ‘PMS Categories not set up correctly’ error may occur. This usually indicates the hotel did not set up the interface to accept the defined category. Review the setup of the PMS system with the controller and determine the information to upload.

Some systems can only accept data through one PMS category. If this is the case, all PMS categories must be set to 1.

4. Repeat the **procedure** until you assign a PMS number to all necessary sales and retail categories.

5. Click **Save** and close the Categories function.
Configuring a Room Service Tender

The PMS Interface uses a room service tender to charge payments to a guest account. To do this, create a new tender and attach it to a tender button in the same way you set up other tender buttons.

The following procedures include the required or suggested settings for the room service tender. We do not discuss other settings on this function tab.

To configure the room service tender:

1. Select Maintenance > Payments > Tenders > Tender tab. The Tenders function tab appears with the Tender tab as the default. See Figure 1-5 for QuickService. See Figure 1-6 for TableService.

![Figure 1-5 QuickService Tenders - Tender Tab](image-url)
2. Enter an **unused number** and press **Enter**.

3. Type **Room Service**, or any identifying text, in the ‘Description’ text box.

4. For TableService operations, assign a **button position** for the tender to display on the FOH by using one of three options:
   - Type a **numeric button position** in the ‘Button’ text box.
   - Select **First Available Button** to place the button in the first available position.

*Figure 1-6 TableService Tenders - Tender Tab*
• Click the **Position** button. The Button Position dialog box appears.

![Button Position Dialog Box]

**Figure 1-7 Button Position Dialog Box**

Select the desired **button position** and click **OK**.

---

For QuickService installations, refer to “Adding the Room Service Tender to a Panel” on page 1-15.

---

5. Select **Active**.
6. Select **Track**.
7. Select **Can Refund**.
8. Select **Allow Tips** to indicate this tender can accept tips, if applicable.
9. Enter the **maximum tip percentage** you can enter in the FOH for tips in Max Tip. Enter the percentage as 10.000 for 10%, 50.000 for 50%, etc.
10. Click **Save** to perform the next step.
11. Select **Room Service** from the ‘Report as’ drop-down list.
12. Click **Save**.
13. Select the **Type** tab.

![QuickService Tenders - Type Tab](image1)

Figure 1-8 QuickService Tenders - Type Tab

![TableService Tenders - Type Tab](image2)

Figure 1-9 TableService Tenders - Type Tab
14. Select **Credit Card** and **Not Applicable** from the drop-down list.
15. Select the **Identification** tab and complete the options on the tab.
16. Select the **Authorization** tab and complete the options on the tab.
17. Select the **Back Office** tab.

*Figure 1-10  QuickService Tenders - Back Office Tab*
18. Select **PMS** to post charges for this tender ID to PMS.

19. Specify the **PMS Tender ID**. You must obtain this setting from the property management system vendor to determine where the tender amount posts to in the PMS system.

20. Do not enter text in the **PMS Room #** option for the tender, if you want to allow FOH entry of a valid guest room number. You can specify a default room number only if all charges to the Tender ID post to the same account.

   You can create multiple PMS tenders by entering the account numbers of the most frequently used general ledger accounts in the ‘PMS Room #’ text box. As you close checks, you can touch the tender for the specific general ledger account number and post the charge to that account on the Aloha Payment Report. as well as posting to the general ledger account number specified by the PMS interface.

21. Click **Save** and close the **Tenders** function.

*Figure 1-11 TableService Tenders - Back Office Tab*
Adding the Room Service Tender to a Panel

For QuickService installations, you must add the tender button to a panel to display on the FOH. For TableService installations, the room service tender appears on the FOH in the button position you specified when you created the tender.

The following procedure includes the required or suggested settings to add the room service tender to a panel. We do not discuss other settings in Panel Editor.

To place the room service tender button on a panel in QuickService:

1. Select **Maintenance > Menu > Panel Editor**. The Panel Editor workspace and toolbar appear.
2. Select **Commands > Edit Panel > Button Functions**. The Edit Buttons - QuickService dialog box appears.
3. Select the panel to contain the Room Service tender and click **OK**. The selected panel appears.
4. Double-click an **unassigned button** or create a **new button**. The Edit Button - QuickService dialog box appears.
5. Select **Tender** from the ‘Function’ drop-down list.
6. Select the **Room Service tender type** from the ‘Tender ID’ selection list on the right. The button text changes from ‘Tender’ to the description entered in the tender definition (usually Room Service).

7. Type the **desired name**, such as ‘Room Charge’ or ‘PMS Charge,’ to display on the FOH button in the ‘Text’ text box.

8. Complete the **remaining options** on the dialog box, such as text, background, and bitmap, as necessary.

9. Click **OK** to exit the dialog box. The newly assigned button appears on the panel.

![Tenders](image.png)

*Figure 1-13  QuickService Panel with Room Service Tender*

10. Select **Commands > Close Panel** from the Panel Editor toolbar. A confirmation appears.

11. Click **OK** to save and close the panel.

### Configuring a PMS Comp

You can define comps to require PMS information, referred to as a dual comp. They require you to enter a name and room number for the transaction. To accommodate guests who charges to their account and guests who do not have a room, you should create two separate comps for each comp in your system: a regular POS comp, and a PMS comp. When you apply a PMS comp, the POS system sends an inquiry to the PMS for verification, and upon approval, decreases the check on the POS system and the sales from the PMS categories on the PMS side.
The following procedure include the required or suggested settings for a PMS comp. We do not discuss other settings on this function tab.

**To configure a PMS comp:**

1. Select **Maintenance > Payments > Tenders**.
2. Type an **unused number** in the ‘Number’ drop-down list, and press **Enter**.
3. Type a **name** for the tender, such as ‘PMS Visa.’
4. Select **Active**.
5. Click **Save** to perform the next step.
6. Select the **comp** from the ‘Report As’ drop-down box.
7. Select the **Back Office** tab.

![Comp Maintenance window](Figure 1-14  QuickService Comps - Back Office Tab)
8. Select PMS Authorize to require you to enter PMS information for the comp, and upon a response, sends the transaction to the PMS.

9. Select Allow PMS Offline Posting to enable offline posting for the comp when the POS system cannot connect to the PMS.

10. Click Save.

11. Repeat the procedure for each comp requiring PMS information.

12. Click Save and exit the Comps function.

Providing the Ability to Approve PMS Offline Posting

In the event the POS system cannot connect to the PMS, you must allow a manager, or an employee with sufficient access, to approve an offline transaction for a PMS tender or PMS comp. To do this, you must select ‘PMS Offline Posting’ on their access level.

To enable the ability to approve PMS offline transactions:

1. Select Maintenance > Labor > Access Levels.
2. Select the access level, such as Manager, from the ‘Level’ drop-down list.
3. Select the Financial tab.

![Figure 1-16 QuickService Access Levels - Financial Tab](image1)

![Figure 1-17 TableService Access Levels - Financial Tab](image2)
4. Select **PMS Auth Offline Posting** to approve offline PMS transactions when the POS system cannot connect to the PMS.

5. Click **Save** and exit the **Access Levels** function.

**Configuring a Room Service Order Mode**

Room service fees (flat fees and percentage fees) are added to orders charged with the PMS Tender ID. Set up flat fees or percentage fees using order mode charges. The charge alerts the chef that the order is for room service, and automatically adds the delivery fee to the check. You can create room service charges by the following methods:

**Flat fee room service charge** — Treats the charge as a fixed dollar amount and applies the fee to the guest check when ordered through room service. To set up this fee, select ‘Fixed Charge’ on the Order Mode Info tab.

**Percentage fee room service charge** — You can apply a percentage fee to a guest check that is ordered through room service. To set up this fee, enter an amount in the ‘Charge’ text box on the Order Mode Info tab. Clear ‘Fixed Charge’ if it is selected. The value is treated as a percentage, rather than a fixed amount.

The following procedures include the required or suggested settings for the room service order mode. We do not discuss other settings on this function tab.

**To create the room service order mode:**

1. Select **Maintenance > System > Order Modes**. The Order Modes function tab appears.
2. Enter an **unused three-digit number** in the ‘Mode Number’ text box.
3. Type **Room Service Charge**, or any identifying description, in the ‘Description’ text box.
4. Select **Active**.
5. Select the **Order Mode Info** tab.

![Figure 1-18 QuickService Order Modes - Order Mode Info Tab](image1.png)

6. Select **Service Charge**.

![Figure 1-19 TableService Order Modes - Order Mode Info Tab](image2.png)
7. Enter the text to display for the **Charge Line Text** on the guest check.

8. To enter a fixed charge, select **Fixed** and enter a **fixed amount** to charge with each transaction.

   To charge a percentage, select **Percentage** and enter a **percentage of the check** to charge with each transaction.

9. Click **Save** and close the Order Modes function.

### Adding the Room Service Order Mode to a Panel

For QuickService installations, you must add the order mode button to a panel to display on the FOH. For TableService installations, the room service order mode appears on the FOH in accordance to the ID number of the order mode.

The following procedure includes the required or suggested settings to add the room service order mode to a panel. We do not discuss other settings in Panel Editor.

**To place the Room Service order mode button on a panel for QuickService:**

1. Access **Panel Editor**.
2. Select **Commands > Edit Panel > Button Functions**. The Edit Panel - Button Functions dialog box appears.
3. Select the **panel** to contain the Room Service order mode and click **OK**. The selected panel appears.
4. Double-click an **unassigned button** or create a **new button**. The Edit Buttons - Quick-Service dialog box appears.
5. Select **Order Type** from the ‘Function’ drop-down list.

   ![Edit Buttons - Quick Service](image1)

   **Figure 1-20** QuickService Order Type Function

6. Select the **Room Service order type** from the ‘Order Type’ selection list on the right. The button text changes from ‘Order Type’ to the description entered in the order mode definition (usually Room Serv).

7. Type the desired **name**, such as Room Service, to display on the FOH button in the ‘Text’ text box.

8. Complete the remaining **options** on the Edit Button dialog box, such as text, background, and bitmap, as necessary.

9. Click **OK** to exit the Edit Button dialog box. The newly assigned button appears on the panel.

   ![Delivery Functions](image2)

   **Figure 1-21** Panel after Room Service Order Mode

10. Select **Commands > Close Panel** from the Panel Editor toolbar. A Save confirmation dialog box appears.

11. Click **OK** to save and close the panel.
Enabling Inquiries with PMS

Performing an inquiry allows you access to the guest’s account through the PMS system and return the balance on the account.

Providing the Ability to Start Checks with an Inquiry

If all of your orders through the POS system are guests at the hotel, you can configure the POS system to start all checks with an inquiry to confirm the guest is registered at the hotel and has a valid room number. This reduces screen touches and confirms the status of the guest early to eliminate unnecessary voids. You can also make this ability optional in cases where the guest does not wish to charge to their room. You must assign the appropriate job code to the employee charging orders to rooms.

The following procedure includes the required or suggested settings of how to configure job code to start checks with PMS for TableService operations. We do not discuss other settings on the Job Codes function tab.

To provide the ability to start checks with an inquiry for TableService:

1. Select **Maintenance > Labor > Job Codes**. The Job Codes function tab appears.

![TableService Job Codes - Job Code Tab](image)
2. Select the **job code**, such as Room Service, from the ‘Number’ drop-down list and press **Enter**. You may have to create a job code specifically for a hotel employee.

3. Select **Start Check on PMS** to allow employees to start checks with a PMS inquiry. The Start PMS Check button appears on the FOH Working with Tables or Working with Tabs screen.

4. Select **Force PMS Check**, if you want employees with this job code to only start checks with a PMS inquiry. The Start PMS Check button appears and does not display the New Tab or New Table button on the respective FOH screens.

5. Click **Save** and exit the **Job Codes** function.

You can accomplish the ability to start checks with a PMS inquiry in QuickService operations with the placement and availability of your function buttons on panels and screens. For maximum efficiency, you should create a script button function which includes an inquiry of the status of the guest and then prompt you to begin a new order.

**To provide the ability to start orders with an inquiry for QuickService:**

1. Access **Panel Editor**.
2. Select **Commands > Edit Panel > Button Functions**. The Edit Panel - Button Functions dialog box appears.
3. Select the **panel** to contain the Room Service order mode and click **OK**. The selected panel appears.
4. Double-click an **unassigned button** or create a **new button**. The Edit Buttons - Quick-Service dialog box appears.
5. Select **Script** from the ‘Function’ drop-down list.
6. Click **Edit**. The Edit Script dialog box appears.
7. Click **Add**. The Select Function dialog box appears.
8. Select **PMS Inquire** and click **OK**. The PMS Inquire function is added to the script.
9. Click **Add**.
10. Select **New Order** and click **OK**. The New Order function is added to the script.
11. Click **OK**. You are returned to the Edit Buttons - QuickService dialog box with the parameters of the script function.

![Edit Buttons - QuickService dialog box](image)

*Figure 1-23  QuickService Scripted Start PMS Check Button Function*

12. Type the desired **name**, such as Start PMS Check, to display on the FOH button in the ‘Text’ text box.

13. Complete the remaining **options** on the Edit Button dialog box, such as text, background, and bitmap, as necessary.

14. Click **OK** to exit the Edit Button dialog box. The newly assigned button appears on the panel.

![Panel after Start PMS Check](image)

*Figure 1-24  Panel after Start PMS Check*
15. Select **Commands > Close Panel** from the Panel Editor toolbar. A Save confirmation dialog box appears.
16. Click **OK** to save and close the panel.

### Providing the Ability to Perform a Standalone PMS Inquiry

You should also provide the ability to perform a PMS inquiry not related to an order, to verify the status of the guest. For QuickService installations, you must add the PMS Inquiry button to a panel to display on the FOH. For TableService installations, the PMS Inquiry button automatically appears on the FOH Close screen when you enable PMS in Maintenance > Store Settings > Hotel group.

The following procedure includes the required or suggested settings through an example of how a FOH user interface screen might look. We do not discuss other settings in Panel Editor.

**To place the PMS Inquire button on a panel for QuickService:**

1. Access **Panel Editor**.
2. Select **Commands > Edit Panel > Button Functions**. The Edit Panel - Button Functions dialog box appears.
3. Select the **panel** to contain the PMS Inquire button and click **OK**. The selected panel appears.
4. Double-click an **unassigned button** or create a **new button**. The Edit Button dialog box appears.
5. Select **PMS Inquire** from the ‘Function’ drop-down list.

![Edit Buttons - Quick Service](image)

*Figure 1-25 QuickService PMS Inquire Function*

6. Type the desired **name** to display on the FOH button in the ‘Text’ text box, if you want text other than PMS Inquire to display.

7. Complete the remaining **options** on the Edit Button dialog box, such as text, background, and bitmap, as necessary.

8. Click **OK** to exit the Edit Button dialog box. The newly assigned button appears on the panel.

![Panel With PMS Inquire Button](image)

*Figure 1-26 Panel With PMS Inquire Button*

9. Select **Commands > Close Panel** from the Panel Editor toolbar. A Save confirmation dialog box appears.

10. Click **OK** to save and close the panel.
Printing PMS Information on Guest Checks

You can enhance the POS side of the PMS Interface so that a room number and a signature line print on the guest check for the guest. Sometimes it is necessary to change the text. For example, in a country club the guest does not have a room number, however, there is a member number.

Printing PMS Information for the Store

The following procedure includes the required or suggested settings. We do not discuss other settings in the Printing group.

To print PMS information on the guest check:

1. Select Maintenance > Store Settings.
2. Select Printing from the ‘Group’ drop-down list. The corresponding tab appears.
3. Select the Check Content 2 tab.

Figure 1-27 QuickService - Store Settings Printing Group - Printing Content 2 Tab
4. Select **Print PMS Guest Name** to enable the room number and guest name (selected from a screen in the FOH) to print on the guest check. This is useful when there are multiple guests staying in the same room.

5. Select **Print PMS Info** to enable a blank line to print for which the guest can fill in their room number and guest name.

6. Select **Print Order Mode** to enable the room service order mode to print on the guest check.

7. Click **Save** and close the **Store Settings** function.

### Customizing the Tip and Room # Lines

You can also customize the tip and the guest room number by revenue center. Typically, you use these options in a TableService environment. The default text for these options are ‘+ Tip=’ and ‘Room #.’ Sometimes it is necessary to change the text. For example, in a country club the guest does not have a room number, however, there is a member number.

To customize the guest check with tip and room # lines:

1. Select **Maintenance > System > Revenue Centers**. The Revenue Centers function tab appears.

2. Select the **revenue center** from the ‘Code’ drop-down list.
3. Select the **PMS Options** tab.
4. Enter the text to print on the tip line in Tip Line Text to customize the text printed for the tip amount. If left blank, the default of ‘+ Tip’ prints. If you prefer other text, such as ‘+ Add Gratuity’, enter the text to print in this text box.

5. Enter the text to print on the room line in Room Line Text to customize the text printed for the room number. If left blank, the default of ‘Room #’ prints. If other text is preferred, such as ‘Member #’, enter the text to print in this text box.

6. Click Save and close the Revenue Centers function.

Other POS Features for PMS Operations

To optimize your POS system for a hotel environment, you can configure the following features on the POS side.

Automatic Gratuity

Automatic gratuities is a TableService concept in which tips are given to servers that are automatically added to the check based on a percentage of sales and the number of guests at the table. In some exclusive hotels, automatic gratuity is always enforced, no matter the sale or guests.

House Accounts

House accounts are used as an accounts receivable setup where the guest charges to an account, sometimes revolving, for later payment. You also use house accounts to charge for non-profit organizations.

Pivot Seating

Pivot seating is a TableService concept that enables you to place orders by seating position of the table to ensure correct tray set up and delivery of food. Restaurants employing this method have a point of reference as the first seating position to start orders, such as the seat facing the bar or the front door. In most hotels, pivot seating is always used.

Tipsharing

Tipsharing is a TableService concept that collects tips from all servers and placed into a ‘tip pool.’ The tips are then divided among all employees, including support staff.
Defining PMS Parameters in EDC

You must set parameters to the property management system in Aloha EDC to post and alter charges and transactions. These settings must coincide with the information from the property management system and are usually never changed, once set.

The PMS interface requires a null modem connection in order to communicate with the PMS server. The typical setup is a serial to RJ45 connector at both ends for a Cat 5 cable. One end of the cable has a null modem adapter between the connector and the serial port. The modem configuration in the PMS Parms dialog box are not currently used.

Refer to the Aloha EDC User’s Guide for more information on Aloha EDC.

To define PMS parameters in Aloha EDC:

1. Launch Aloha EDC.
2. If POS processing is turned on, select File > Stop POS Processing.

Figure 1-31 PMS Menu
3. Select **PMS > Parms**. The PMS Parms dialog box appears.

![Figure 1-32 PMS Parms Dialog Box](image)

4. Select the **COM port number** used by Aloha EDC to communicate with the hotel’s PMS.
5. Select the **baud rate**, or speed required for the communication link. This text box defaults to 9600.
6. Select the **parity** to use. Enter N, E, or O, with O being the default.
7. Select the **databits** to use. This text box defaults to eight.
8. Select the **stopbits** to use. Enter 0 or 1, with 1 being the default.
9. Type the **length of time** the EDC system should wait for the hotel’s PMS to respond after a message is sent before the response times out.
10. Type the desired **length of time** the Aloha system gives the hotel’s PMS to send an entire message after the Aloha system begins to receive it.
11. Type the **number of times** the Aloha system sends another message to the hotel’s PMS if there is no response the first time.
12. Select the **debout** to include extra debug messages in Debout.txt for additional troubleshooting assistance.
Using Aloha PMS

This chapter discusses the operation and procedures for the Aloha PMS Interface, such as how to apply a room service charge, gratuity, and inquire about a guest’s room and charging status.

Performing FOH Operations in QuickService ................................... 2-4
  Applying a Room Service Order Mode ........................................ 2-4
  Charging an Order to a Guest ................................................... 2-6
  Inquiring a Guest Account ....................................................... 2-10
Performing FOH Operations in TableService ................................. 2-12
  Starting a Check with PMS ...................................................... 2-12
  Applying a Room Service Order Mode ...................................... 2-13
  Charging an Order to a Guest .................................................. 2-15
  Performing a PMS Inquiry ...................................................... 2-18
Handling Offline PMS Transactions ............................................. 2-21
Performing PMS Functions from the BOH .................................... 2-23
  Posting a Charge from the BOH .............................................. 2-23
  Inquiring a Guest Status from the BOH .................................... 2-25
  Adjusting a Charge from the BOH ............................................ 2-26
  Deleting a Charge from the BOH ............................................. 2-27
Troubleshooting PMS ................................................................. 2-29
  Viewing the Debug Log .......................................................... 2-29
  Viewing the Charge Report .................................................... 2-30
This chapter discusses, in detail, the operations involved for Aloha PMS Interface. In this section you learn how to:

• Place an order with the Room Service order mode.
• Charge an order to the guest’s room.
• Use PMS Inquire to inquire about a guest’s room status.
• Apply gratuity to a check either manually or automatically.
• Post, adjust, and delete PMS transactions.
• Review PMS information using the Debug Log and Charge Report.

The Aloha PMS Interface provides an important link between the Aloha system and the hotel’s property management system. After the proper setup, the PMS system can verify the registration of a guest and charging privileges, apply charges to the guest, or separate guests in the same room, and assist hotel accounting personnel with tracking charges posted each day.

This chapter is divided into three sections for Aloha PMS Interface operations: Aloha QuickService, TableService, and Aloha EDC. Please refer to the Aloha product installed at your location. You must have completed the setup procedures in Chapter 1 and have security key access to perform the operations in this chapter.
Performing FOH Operations in QuickService

Working with Aloha PMS Interface in the Front-of-House (FOH) at any hotel restaurant or cafeteria is simple. The QuickService product provides user-definable screens with unlimited combinations of setups and designs to meet the criteria for any scenario. The examples used in this section will differ from your actual screens and coincide with the setup requirements explained in chapter one. We will discuss only the elements vital to the Aloha PMS Interface. Other buttons, panels, or FOH procedures are not discussed.

Applying a Room Service Order Mode

You can apply room service orders to a guest's room like any other order mode. To apply an order to a guest’s account, enter the order on the Aloha system as normal. In this example, the room service order mode is located in the bottom right.

To apply the room service order mode:

1. Enter items of your choice that are available to you.
2. Touch the order mode button configured for room service.
3. A preceding indicator appears for each item in the guest check window for room service preparation. The text color changes from blue to black. Also, we applied a fixed $2.00 charge to the order as an additional flat room service fee. If we set up the room service order mode to apply a percentage charge, the charge would be $0.40.

Figure 2-2 Panel after Order Mode Applied (Flat Fee)

Figure 2-3 Panel after Order Mode Applied (Percentage)
Charging an Order to a Guest

You can charge orders to a guest’s room like any other tender and post the amount to the PMS. To charge an order to a guest’s account, continue the procedure from the previous example to close the guest check. In this example, we placed the room service tender on the tender panel.

![Panel before Tender Applied](image)

*Figure 2-4* Panel before Tender Applied
To charge an order to a guest:

1. Touch the **tender button configured for a PMS charge**. The corresponding screen appears.

   ![Room Chg](image)

   **Figure 2-5** Room Charge Screen (Apply Amount)

2. Enter the **amount charged** and **tip amount** by using the keypad or touch **OK** to accept the displayed amount. The prompt advances to Room # and the keypad changes to alphanumeric.

   ![Room Chg](image)

   **Figure 2-6** Room Charge Tender (Apply Room Number)
3. Enter the **room number** using the alphanumeric keypad and touch **OK**. The Please Select One screen appears with a list of registered guests for the corresponding room number.

![Figure 2-7 Please Select One Screen (Room Charge)](image)

---

When using the Encore PMS type, you do not receive the Please Select One screen and select a guest.
4. Select the **guest** to which to apply the charge and touch **OK**. The guest check appears with the applied charge next to the guest.

![Screen after Room Service Charge Applied](image)

*Figure 2-8* Screen after Room Service Charge Applied

If the interface cannot find the room number, an error message appears:

![Error Message](image)

*Figure 2-9* Room Number Not Passed Error

Touch the message and enter a valid room number. If the amount is sufficient to cover the check, the check closes and the main screen returns to start a new order.
Inquiring a Guest Account

You can inquire into a guest's room status using the PMS Inquire button. Use this feature at any point of the ordering process and determine if the guest is registered with the hotel and has the authority to charge orders to their room.

To inquire into a guest's room status:

1. Touch the **button configured for PMS Inquire**. The Enter Room Number screen appears.

![Figure 2-10 Enter Room Number Screen](image)
2. Enter the **room number** of the guest and touch **OK**. The PMS Inquire Information screen appears.

![PMS Inquire Information Screen](image1)

*Figure 2-11 PMS Inquire Information Screen*

The screen lists the guests registered to the selected room. You cannot apply charges from this screen.

3. Touch **OK** to exit the screen.

If the Aloha system is not in sync with the hotel’s PMS, an error message appears:

![Error Message](image2)

*Figure 2-12 No Response Error Message*

Touch inside the error box and check the connection and settings between the Aloha system and the hotel’s PMS.
Performing FOH Operations in TableService

Working with Aloha PMS Interface in the Front-of-House (FOH) for TableService at any hotel restaurant or cafeteria is simple. The TableService product provides system generated screens which standardizes the FOH user interface. The examples used in this section will differ from your actual screens and coincide with the setup requirements explained in chapter one. Only the elements vital to the Aloha PMS Interface are discussed. Other buttons, screens, or FOH procedures are not discussed.

Starting a Check with PMS

You can use the PMS Check button on the Working with Tables screen or a floor plan to determine the status of a guest and begin ordering. In this example, we force the room service operator to start checks with the PMS Check button and not with the New Table/Tab button.

To start a check with PMS:

1. Touch PMS Check. The Enter Room Number screen appears.
2. Enter the room number and touch OK. The Please Select One screen appears with the registered guests for the room.

Figure 2-13  Working with Tables Screen with Force PMS
3. Select a **guest** and touch **OK**. The Enter Guests screen appears.
4. Enter the **number of guests** and touch **OK**. The Order Entry screen appears for ordering.

If you are using pivot seating, the Enter Guests screen does not display.

**Applying a Room Service Order Mode**

You can apply room service orders to a guest’s room like any other order mode. To apply an order to a guest’s account, enter the order on the Aloha system as normal. In this example, we placed the room service order mode in the top right of the Order Entry screen.

![Order Entry Screen before Order Mode Charge](image)

*Figure 2-14  Order Entry Screen before Order Mode Charge*
To apply the room service order mode:

1. Enter items of your choice that are available to you.
2. Touch Room Service.

A preceding indicator appears for each item in the guest check window for room service preparation. The text color changes from blue to black.

3. Touch Close. The Close screen appears with a fixed $2.00 charge applied.

Figure 2-15 Order Entry Screen after Order Mode Applied

Figure 2-16 Close Screen with Order Mode Applied (Flat Fee)
Or as a percentage charge.

![Close Screen with Order Mode Applied (Percentage)](image)

Figure 2-17  Close Screen with Order Mode Applied (Percentage)

4. To delete the room service charge, touch **Remove M Charge** located on the bottom of the Close screen.

---

When you select Remove M Charge to delete the charge, the button disappears and you cannot reapply the fee.

---

**Charging an Order to a Guest**

You can charge orders to a guest’s room like any other tender. To charge an order to a guest’s account, continue the procedure from the previous examples, shown in Figure 2-14 and Figure 2-15, to close the guest check.

---

Like all tender screens, the name of the screen coincides with the description of the tender, as defined in Maintenance > Payments > Tenders.
To charge an order to room service:

1. Touch the **room service tender.** The Room Charge tender screen appears.

![Room Charge Tender Screen (Amount)](image1)

2. Enter the **amount charged** using the keypad, or touch **OK** to accept the displayed amount. The prompt advances to the Tip line, if applicable.

3. Enter the **tip amount** and touch **OK.** The prompt advances to the Room # line and the keypad changes to an alphanumeric keypad.

![Room Charge Tender Screen (Room Number)](image2)

---

To charge an order to room service:

1. Touch the **room service tender.** The Room Charge tender screen appears.

![Room Charge Screen (Amount)](image3)

2. Enter the **amount charged** using the keypad, or touch **OK** to accept the displayed amount. The prompt advances to the Tip line, if applicable.

3. Enter the **tip amount** and touch **OK.** The prompt advances to the Room # line and the keypad changes to an alphanumeric keypad.

![Room Charge Tender Screen (Room Number)](image4)

---

2 – 16 Using Aloha PMS Interfacing PMS with Aloha v6.1
4. Enter the **room number** using the alphanumeric keypad and touch **OK**. The Please Select One screen appears with a list of registered guests for the room number.

![Please Select One Screen](image1.png)

*Figure 2-20* Please Select One Screen

5. Select the **guest** to which to apply the charge and touch **OK**. The Close screen appears with the charge applied to the selected name.

![Close Screen](image2.png)

*Figure 2-21* Close Screen

6. Touch **Close** to close the check.
Performing a PMS Inquiry

Use the PMS Inquire button at any point of the ordering process to determine if the guest is registered with the hotel and has the authority to charge orders to their room. This button is located on the Working with Tables screen or placed on a floor plan.

The PMS Inquire button is not available on the Working with Tabs screen if Delivery/Frequent Buyer is also being used.

Figure 2-22  Working with Tables Screen
It is also located at the bottom of the Close screen.

![Figure 2-23 Close Screen](image)

**Figure 2-23** Close Screen

To perform an inquiry on a guest’s room status:

1. Touch the **PMS Inquire** button. The Enter Room Number screen appears.

![Figure 2-24 Enter Room Number Screen](image)

**Figure 2-24** Enter Room Number Screen
2. Enter the **room number** of the guest and touch **OK**. The PMS Inquire Information screen appears.

![PMS Inquire Information Screen](image)

*Figure 2-25  PMS Inquire Information Screen*

The screen lists the guests registered to the selected room. You cannot apply charges from this screen.

3. Touch **OK** to close the PMS Inquire Information screen.
Handling Offline PMS Transactions

In the event the Aloha POS system cannot connect to the hotel PMS, and offline posting is configured, the POS system marks the transaction as unposted in the Trans.log and ground into other grind files, allowing the POS system to close the check and create a report for unposted transactions. You can define an offline posting slip that prints to a designated printer when the PMS cannot connect. The slip uses values from the PMS Offline.ini file in the \Data and \Newdata directories to translate the .req file into readable terms and prints to a defined printer.

If the POS system cannot connect to the hotel PMS, the manager approval screen appears.

![Figure 2-26 PMS Offline Manager Approval Screen](image)

Figure 2-26  PMS Offline Manager Approval Screen
Enter the password and touch OK to approve the offline transaction. If the connection is still lost, the system asks you if you want to post the transaction as offline.

Touch OK to apply the PMS charge to the check on the POS side. The Offline receipt prints at the local printer and you must apply the charge to the PMS.

Figure 2-27 Offline Approval Screen
Performing PMS Functions from the BOH

Aloha EDC plays an integral part in the communication of the Aloha system and the hotel’s property management system. If you are licensed for Aloha EDC, the credit card authorization process is automated. The Aloha system processes EDC requests in the background, thus it does not interfere with normal order entry operations.

The Aloha EDC program *must* be running to communicate with the hotel’s property management system.

To access the application, launch Aloha EDC.

![PMS Main Menu](image)

*Figure 2-28  PMS Main Menu*

Posting a Charge from the BOH

You can post charges to a guest’s room from the BOH with the Post Charge command. Use this only if the FOH is not running and you need to charge an order to a guest’s room.
To post a charge from the BOH:

1. Select **PMS > Charge**. The PMS Authorize Transaction dialog box appears.

2. Type the **account number** or the **room number** of the guest.
3. Type the **revenue center** in which to charge the credit.
4. Type the **PMS tender ID** that coincides with the PMS.
5. Select **Direct Bill** to indicate the guest’s order is directly billed to an individual or company address.
6. Type the **check total information**, such as sales, service charges, and taxes, in the ‘Sales TTL 1’ through ‘Sales TTL 16’ text boxes. These options break sales down into the 16 defined PMS categories. Enter a dollar amount for each category the property management system uses. For example, enter 30 in the Sales TTL 1 text box (if 1=Food) and 7 in the Sales TTL 4 text box (if 4=Wine) for an order that includes two steaks for $30 and two glasses of wine for $7.
7. Type the **dollar amount of the discount**, if you applied promotions or comps to the check.
8. Type the **tax amounts by tax rate**, in the ‘Tax 1 to 4’ text boxes.
9. Type the **tip amount** in the ‘Service Charge 1’ text box, if any.
10. Type the **surcharge amount** in the ‘Service Charge 2’ text box, if any.
11. Type the **check number** in the ‘Selection #’ text box. The system assigns each guest a number when more than one guest is registered to a room. Most property management systems allow only four guests per room, however, some systems support up to eight guests.

12. Click **OK** to automatically post the transaction and send it to the hotel’s property management system and exit the PMS Authorizing Transaction function.

If any errors are made in the data entry, a message appears on the screen. :

![PMS Response Info Dialog Box](image)

*Figure 2-30  PMS Response Info Dialog Box*

13. Click **OK** and retry posting the charge.

14. Repeat the **procedure** until all charges are posted

**Inquiring a Guest Status from the BOH**

The Inquire command inquires about a guest’s status from the BOH or FOH. Use this to determine whether the guest is assigned to a room at the hotel and has charging privileges.
To inquire a guest status from the BOH:

1. Select **PMS > Inquire**. The PMS Inquire dialog box appears.

![PMS Inquire Dialog Box](image)

*Figure 2-31  PMS Inquire Dialog Box*

2. Type the account number or room number.
3. Type the employee number of the person initiating the inquiry.
4. Click **OK** to automatically send the inquiry to the hotel's PMS and exit the PMS Inquire function. The person(s) assigned to the room and the credit amount(s), if any, display on the screen when the hotel’s property management system responds.
5. Repeat the **procedure** until all inquiries are sent.

**Adjusting a Charge from the BOH**

The Adjust Charge command adjusts charges after they are posted. You can adjust charges for the current business day *only* because the EOD process clears them.
To adjust a charge from the BOH:

1. Select **PMS > Adjust Charge**. The Adjust Charge dialog box appears.

![PMS Transaction Number](image)

*Figure 2-32 PMS Transaction Number*

2. Type the **transaction number** to adjust. Use the Charge report to determine the transaction number, which is also called the PMS ID number.

3. Click **OK**. The PMS Adjustment Transaction dialog box appears with all fields populated, except the Enter Check Totals section.

4. Make the **desired adjustments** and click **OK** to send the adjusted charge through to the hotel’s property management system. Any BOH adjustments to charges do not display in the FOH with the current version of Aloha EDC.

5. Repeat the **procedure** for all necessary charges in need of adjusting.

### Deleting a Charge from the BOH

The Delete Charge command deletes charges after they are posted. You can delete charges for the current business day *only* because the EOD process clears them.
To delete a charge from the BOH:

1. Select PMS > **Delete Charge**. The PMS Transaction Number dialog box appears.

2. Type the transaction number to adjust. Use the Charge report to determine the transaction number, which is also called the PMS ID number.

3. Click **OK**. The PMS Delete Transaction dialog box appears with all fields populated, except the Enter Check Totals section.

4. Click **OK** to delete the entire transaction from the account on the hotel’s property management system.

5. Repeat **steps 1 through 4** until all necessary charges are deleted.
Troubleshooting PMS

You can use the Debug log and the Charge report to help troubleshoot PMS transactions on the side of the Aloha POS system.

Viewing the Debug Log

The Debug Log command opens Debout.edc, located in the \Tmp directory. Use this file to troubleshoot problems that occurred in Aloha EDC.

To view the debug log:


![DEBOUT.EDC Log](image)

2. Select File > Save As in WordPad to save the report, if desired.
Viewing the Charge Report

The Charge Report command opens Report.txt located in the \Tmp directory. This includes transactions posted for the current business day only because the EOD process clears them.

To view the Charge report:


Charge reports contain the guest’s room number, the amount of the charge, and a PMS ID number. The PMS ID number is a unique number assigned by the Aloha system to each transaction charged to the hotel’s property management system.

2. Select File > Print to print the report or select File > Save As to save the report, if desired.

Figure 2-35 REPORT.TXT Report
Index

A
Adjust Charge  2-26

C
Charge Report  2-30

D
Delete Charge  2-27

G
Guest Check Print Settings
  room #  1-30

I
Inquire  2-25

M
Max Tip  1-11

P
PMS categories  1-8
PMS check box  1-14
PMS Inquire Button  2-18
  using  2-18
PMS Room #  1-14
PMS settings  1-4
PMS Tender ID  1-14
R
Room Service Fee (Flat Fee) 2-18
Room Service Fee (Percentage) 2-18

T
Tender ID 1-20
tips 1-11

W
Working in the Front-of-House 2-4