Property Manager Configuration

Property Managers initial configuration is performed through the FreePBX / PBXact PBX WebGUI. Once configured, Hotel users (staff, guests and non-admin staff) will use the User Control Panel (UCP) of FreePBX / PBXact to access the Property Manager Dashboard for regular use and operation. (UCP is the end user Dashboard of FreePBX/PBXact which includes FrontDesk access, if enabled by the PBX administrator. For more information on UCP click here)

Configuration

Before starting to setting up Property Manager, you must to perepare some stuff like:

- Add some extensions which will be used for your hotel. (*These exentions should not include any user manager account*).
- Once Sangoma Property Manager installed. Create four groups into *Property Management* Directory using User Manager module. (for example: **Receptionists**, **Accountings**, **Restaurant**, and **Customer Hotel**).
  Please restrict the group to allow what you want the users within group can use. By default all the options are allowed.
- Next, create some accounts for each group inside *Property Management* Directory, except **Customer Hotel**. (*For any check-in, the user will be included into this group, and removed diring check-out*).
- In case where you've got a licence for the Class of Services, create them beginning per PMS just to separating hotel and the office. Next, the fields should shown only CoS which start per PMS only.

Do not delete Property Management directory and groups related to it. The risk is to break everything.
If the customer group is deleted then:

- **If empty** :
  - Recreate this one.
  - Go to Privileges
  - Select again the customer group
  - Submit.
- **If not empty** :
  - Recreate this one.
  - Add the rooms checked in manually one by one.
  - Go to Privileges
  - Select again the customer group
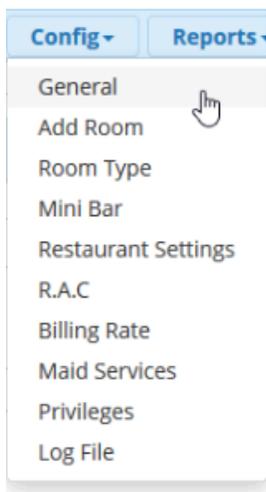 - Submit

General

- To setup Property Manager for your company, log-in to the FreePBX / PBXact Phone System webGUI and navigate to the **Applications** > **Property Manager**
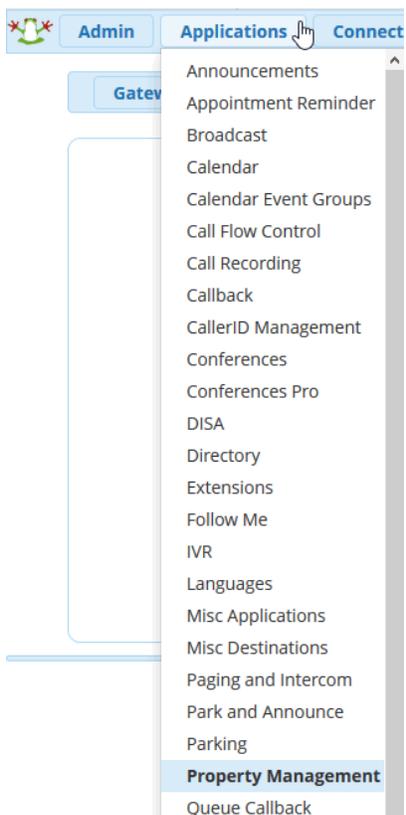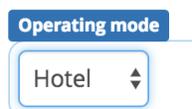
- Click on the **Config** tab to access all the configuration and setup options for Property Manager

| Home | Check In | Check Out | Wake Up | List▾ | Config▾ | Reports▾ | Booking▾ | Menu / Orders |

- Select **General** to start configuring the basic options

- Define the **Operating Mode** for Property Manager.
  Click on the toggle arrows to make changes. (By default this is set to Hotel)

For more detail on any of the items listed in this General section, click on the question Mark to expose details

General ❓ ⬅

- Define the **Features.** Click on switch buttom to select **Yes** or **No**, which will enable the individual feature.

| Operating mode | Features | Company | Email Settings | Dialplan | Taxes | Discount | Customer Ticket |

| Lock Room During Checkout | Yes | | Call Between Rooms | Yes | | Room Needs Cleaning | No |

Below is a description for each feature listed:

Item	Details
Lock Room During Checkout	Lock the room phone upon *check-out*. Any phone calls from a locked room will be redirected to the receptionist.
Call Between Rooms	Allow calling between rooms
Room must be clean	Force room to be *clean* before *checking-in*. Disabling this feature allows *check-in* to rooms if they are dirty

- Define the **Company** details, such as logo, address and email

Logo

Parcourir... Aucun fichier sélectionné.

Company Location

Hotel California
56 Route de Vannes
56400
La Roche Bernard
Tél : (33)297565656

Email

hotel.california@orange.fr

Below is a description for each item:

Item	Details
Logo	Company logo to be displayed on the Property Manager home screen. Click on *Browse* to select a logo from your local computer. Supported image types are *jpg*, *png* or *gif* format.
Company Localization	Address of the Hotel or property

Email	The email address entered here will be used for email notifications when Property Manager needs to send an email to the administrator

- Define the **Email Settings**

From Name

Admin Hotel

Subject

Your invoice

Body

Hello
Here your invoice.

Best Regards.
Admin Hotel.

This information will be sent to the customer when an invoice is emailed to them.

- From Name : eg. The receptionist
- Subject : eg. Your invoice.
- Body : Write whatever about this content

- Define the **PSM Dialplan**

Receptionist

100

Emergency Route

emergency

Context used by default for Check-In

from-pms

Context used by default for Check-Out

from-pms

Receptionist

100

Emergency Route

Emergency

Class of Services   Ye

Class of Service used by default for Check-In

PMS-CI

Class of Service used by default for Check-Out

PMS-CO

Below is a description for each item:

Item	Details
Receptionist	Define an extension number for the receptionist. This can also be a ring group
Emergency Route	Define the emergency route to be used by any phone to dial emergency services

COS used by default for Check-in	Set the context name used by Class Of Services (COS) when a room is check in. (from-pms by default). If no COS licence is present then you will be able to using context only (you can select your own custom context as well). Else, you could select any Class of Service present withiin list. The context related will be always from-pms in the case where COS is selected. Otherwise, from-pms is selected only.
COS used by default for Check-Out	Set the context name used by Class Of Services (COS) when a room is check in. (from-pms by default). If no COS licence is present then you will be able to using context only (you can select your own custom context as well). Else, you could select any Class of Service present withiin list. The context related will be always from-pms in the case where COS is selected. Otherwise, from-pms is selected only.

When you create your Class of Service, each one should start per PMS- .This way is done to make the difference between different Class of Service used for Hotel or the office.

: When an emergency alert is called by any room, the receptionist is also called with a message played in her extension. The web page is redirected to the emergency page with all the information about this alert. (Who and when).

You must delete this message within this page for avoid to be redirected on this emergency page again and again .

Please, make sure this route is allowed in all the COS if this one is used.

- Define the tax structure under **Charges**

General ⍰

| Operating mode | Features | Company | Email Settings | Dialplan | Taxes | Discount | Customer Ticket |

Tourist tax %	Currency	Rounded	Discount %
3.50	fr_FR	No	20.00

Charges

Add

Label [_____] value [____] **Save**

Taxes available
- Taux Normal
- Taux intermédiaire
- Taux Résuit

⏮

Taxes to be used

Search [_____]

Actions	Formula	Label	Value
✏ 🗑		Taux Normal	20.00 %
✏ 🗑		Taux intermédiaire	10.00 %
✏ 🗑		Taux Résuit	5.50 %

Showing 1 to 3 of 3 rows

Below is a description for each item:

Item	Details
Charges	You can add some taxes as you want. Just click on Add button. You can edit and delete any taxe from the list.
Label	Write a name for your new tax.
Value	Give a value for your new tax.
Taxes available **Taxes to be used**	You can merge two or more taxes between them. e.g: minus + usual = global. Select some taxes in Taxes available aera usign your mouse and shift key. These taxes will be showed inside Taxes to be used area. The sum is automatically calculated between them. Click on Save button to save your new taxe.
Tourist tax (%)	Enter a tourist tax, if one exists.
Discount (%)	Enter a discount (*for rooms only*)
Rounded	Set the rounded value for phone call durations
Currency	Set your currency as: en_US, en_GB, fr_FR ...Etc

- Define **Scheduled Discount**

- At first, this menu is empty. If you want to schedule some discounting for the curent year, select any items for the job.
  - Discounting : Applies a rate for whole rooms of the hotel.
  - Room : Applies a price for a room type.
- You can select a date (Month / Day) to start the changes.
- File the value for this new rates
- File the label for this rate.
- If you need to delete one, click on trash on the picture dispplayed on top of the fields.

These changes are applied every night through crontab. If your server is down and the schedule is passed, then delete it and create another one for the next day.

- Define **Customer Ticket**

You must define a content for ticket which will be displayed after each check-in.

| Operating mode | Features | Company | Email Settings | Dialplan | Taxes | Discount | **Customer Ticket** |

Header

```
<h1>Welcome To Hotel Califonia</h1><br>
<br>
The schedules for the restaurant are:<br>
<li> <b>Breakfast</b> - 06h30AM to 09h30 AM</li>
<li> <b>Lunch</b> - 12h00AM to 02h00 PM</li>
<li> <b>Dinner</b> - 07h00 PM to 09h30 PM</li>
```

Body

```
<h2>Your Room Services</h2>
<br>
```

Footer

```
<h1>The Team of the Hotel wish you a good stay.</h1>
```

Preview

You must to include some simple HTML tags.

The features will be displayed inside body, bottom the last line.

Click on submit and return on Customer Ticket and click on Preview button to see its result like this:
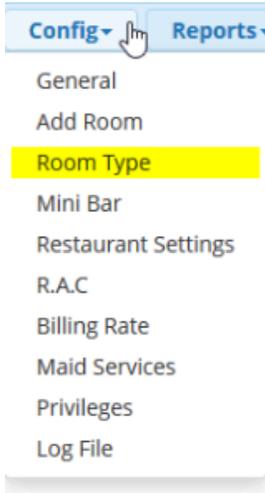
Once all the items are configured, click the **Submit** button to save all changes.

Room type

This sections defines the room type.

- Navigate to Config > Models

Action		Types	Description	Price	Additional Guests	Taxes
🗑	✏	Single	good room	101.00	10.00	18.00
🗑	✏	twin	Great Room	150.00	10.00	18.00

Below is a description for each item:

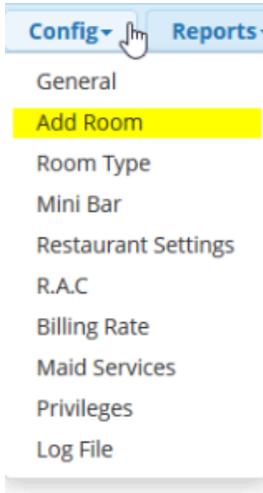| Item	Details
Type	Name for the room type
Price*	The Price for the room type

Guest + *	Price for the Room Type when an additional guest is added to the room
Taxes	Tax amount for the room.

You can edit and delete each room type as well.

Adding Room

This section configures all the room types with their respective room number and Models

- Navigate to **Config > Add Room**

- Configure each room with their name, extension phone number and their room type. Below is an example:

Add Room ❓

Search

| Extension Type	Exten	Name	Room Type
👤	100	Receptionist	
🛏	200	Room 200	Single
🛏	201	Room 201	Single
🛏	202	Room 202	Single
🛏	203	Room 203	Single
🛏	204	Room 204	Single
🛏	205	Room 205	Single
🛏	206	Room 206	Single
🛏	207	Room 207	Single
🛏	208	Room 208	Single

- Once completed, click the **Submit** button to save changes.

Billing Rates

Set the cost for phone calls made from rooms

- Navigate to **Config > Billing Rates**
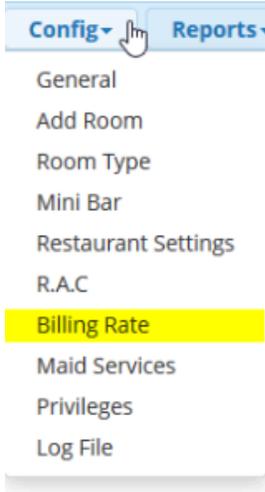
- Click the + icon to create a billing rate for a specific type of call made (i.e. international phone calls). You will be able to add a rate until all outbound route will be completed. Each outbound route needs to be linked to a rate.

- Fill in the required details on the screen that pops up

Billing Rates ❓

Action	Outbound Route	Connection Charge	Billing Increment	Price	Taxe	Mask
🗑 ✏	emergency	0.00 $	60"	0.00 $	18.00%	0
🗑 ✏	out	0.00 $	60"	0.13 $	18.00%	4

Showing 1 to 2 of 2 rows

Below is a description for each item:

Item	Details
Outbound Route	Outbound route used for the call type
Billing Duration	Rate duration in seconds. Eg.: 60 (for 1 minute). Zero is not permitted
Mask	Number of digits to be hidden from Invoice, for privacy purpose
Prefix	The starting pattern for the dialled number. Eg.: 0123. (Note: If a prefix is used to make outbound calls, that prefix must be added in front of this prefix)
Connection Charge	Rate offset, in currency. Eg.: 0.5 if your currency is $, the value of this offset will be $0.5 per call.
Price	Price for this call type based on the duration. Eg.: 0.10 (for 60 seconds)

You can edit or delete a rate as well.

When all outbound route will be completed, no way to add any new rate. And you must use all outbound route available within list.
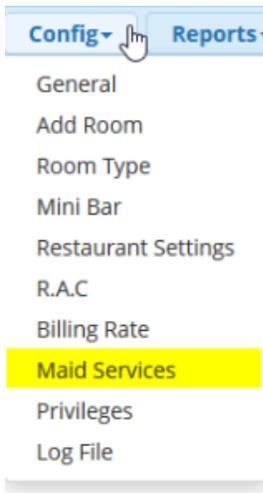
- Click the **Submit** button once completed, to save.

Maid Services

Create room service options for guests to use during their stay. A guest can dial a room service option to alert the receptionist, by dialling a prefix + Service Number (mentioned below).

- Navigate to **Config > Maid Services**

- Click the + icon to create a maid service option

- Fill in the required details on the screen that pops up

  Two choices here.

  - TTS

  - Audio File.

Below is a description for each item:

Item	Details
Service Number	Service number you wish to associate with the room service option (typically a 2 digit number) . Up to 14 (01 - 14) Service Numbers can be defined
Label *	Friendly name provided to the Service Number (i.e. 'Need Help)
File	You can select a custom audio file recorded through **System Recording** menu.
Priority Level	Priority Level for the Service Number. The receptionist will respond to this request using the priority level. A Service Number with higher priority (ie..1) will be responded to first.

Click on trash to delete an item.

- Click the **Submit** button once completed, to save

Submit

- Below is an example alert which the receptionist will receive when a guest dials a Room Service request from their phone or through UCP interface

Room Service present!   ✕

Room List ❓

Search

| Details	Name / Status	Room	Ext.	Types	Grp	Transfer	CoS	Free	Clean	Bar	DND	Alarm Clock
🛏	Danard Franck 🗑 Need help ★☆☆☆	Room 200	200	Single		⤬	📞	✗	✗		👤	
📁	*Free*	Room 201	201	Single		⤬	📞	✓	✓		👤	
📁	*Free*	Room 202	202	Single		⤬	📞	✓	✓		👤	
📁	*Free*	Room 203	203	Single		⤬	📞	✓	✓		👤	
📁	*Free*	Room 204	204	Single		⤬	📞	✓	✓		👤	
📁	*Free*	Room 205	205	Single		⤬	📞	✓	✓		👤	
📁	*Free*	Room 206	206	Single		⤬	📞	✓	✓		👤	
📁	*Free*	Room 207	207	Single		⤬	📞	✓	✓		👤	
📁	*Free*	Room 208	208	Single		⤬	📞	✓	✓		👤	
📁	*Free*	Room 209	209	Single		⤬	📞	✓	✓		👤	

Showing 1 to 10 of 10 rows

- To delete any message, click on the **trash** below the guest name.

RAC

Remote Access Control (RAC) is an optional feature to be used to send some request to any device during check-in / check-out like: **Ip Relay**
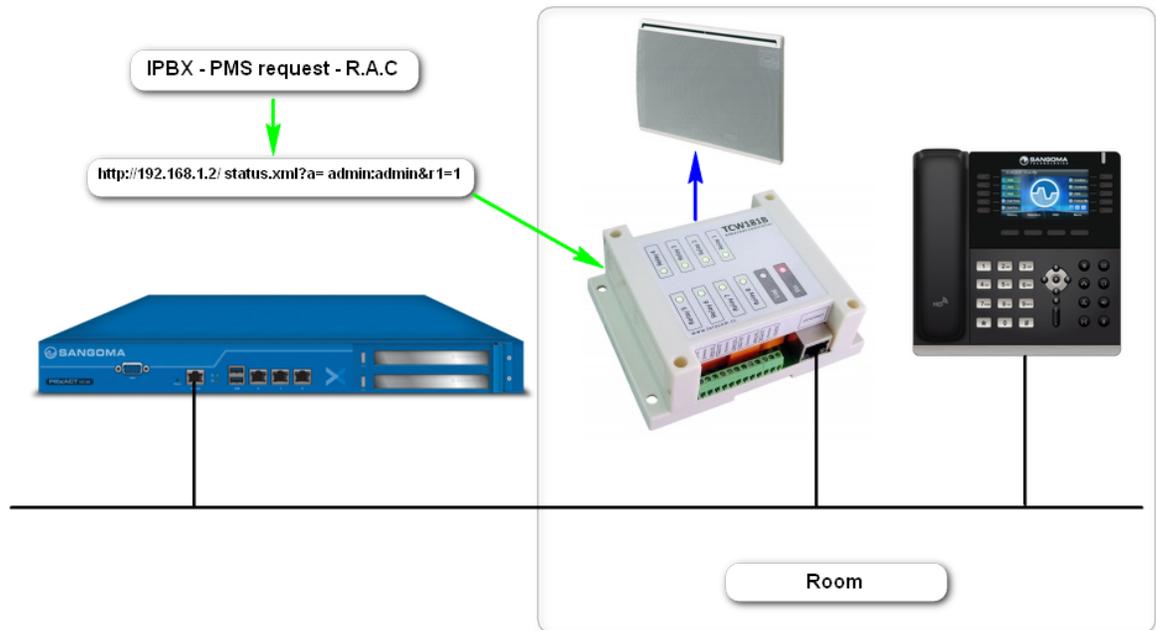
- Navigate to **Config > R.A.C**
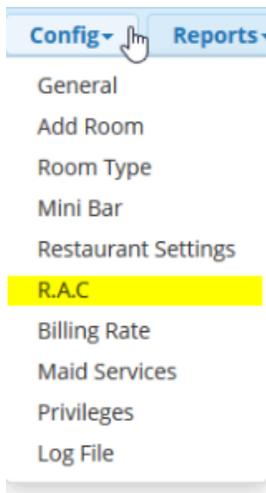
- Click on the **Edit** tab beside the room which you wish to add a URL to

Remote Action Control ❓

Room name	URL for Check-In	Checkout
Room 200		

Search | 🔄 | ▤ | ⋮▾

Edit	Room	Check-in	Checkout
✏️	Room 200	None	None
✏️	Room 201	None	None
✏️	Room 202	None	None
✏️	Room 203	None	None
✏️	Room 204	None	None
✏️	Room 205	None	None
✏️	Room 206	None	None
✏️	Room 207	None	None
✏️	Room 208	None	None
✏️	Room 209	None	None

- Enter in the URL for Check in and Check out for the respective room

URL Check In

Checkout

Example URL:
http://your_remote_device/status.xml?a=admin:admin&r1=1 for checking
http://your_remote_device/status.xml?a=admin:admin&r1=0 for checkout

To delete an URL, leave blank the fields.

- Click the **Submit** button to save changes

» **Submit**

Privileges

Property Manager Dashboard (accessible from UCP) feature permissions can be assigned for specific user groups (ie. Receptionist, Accounting, Hotel guests)
For example, you may wish guests to have access to UCP to send requests to the receptionist, but also restrict other UCP features that only Hotel staff should have

- To assign permissions for specific user groups, navigate to **Admin > User Management**

- Select the **Groups** tab, then **Add** to create a user group

Add Group

Fill in the appropriate information for the Group you wish to create.
Example: Group name = Hotel Guests
      Group Description= Property Manager Hotel Guest
      Users= the user extensions that represent the existing users (i.e room number or receptionist)

- Select **UCP** then **Property Management,** then **Yes** for **Enable Property Manager Handling**

- Click **Submit** to save your changes

- Repeat the same steps above for each individual user group you wish to have specific permissions within Property Manager
- Navigate to **Applications > Property Management**

- Navigate to **Config > Privileges**
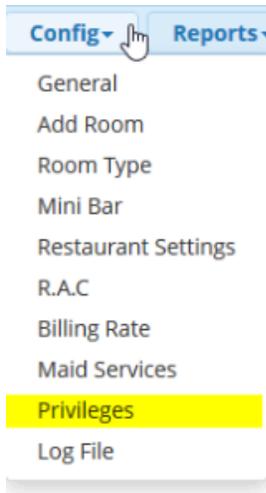
- For each of the Labels (Receptionist, Accountings, Hotel Guests, Restaurant) select the appropriate user group previously created, for each

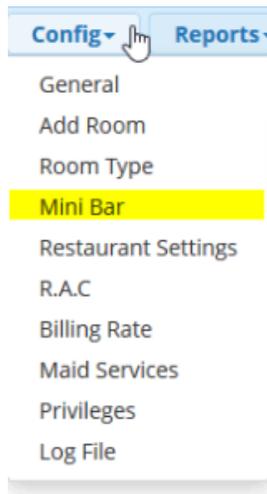- Within each Label a number will represent the number of users registered for each group
- Click the **Submit** button once changes are completed

Mini Bar

- Navigate to **Config > Mini Bar**

- You can enter ten products (0-9) to be used with the mini bar. So, one digit = one produt.

Mini-bar ❓

| Search | | | 🔄 | ▦ ▾ |

| Digits	Products	Prices	Taxes
0	Pepsi Cola	2.00	VAT minus
1	Coca	2.00	VAT minus
2	Water	1.00	VAT minus
3	Whiky	4.00	VAT minus
4	Beer	2.50	VAT minus
5	Milk	0.90	VAT minus
6		0.00	VAT usual
7		0.00	VAT usual
8		0.00	VAT usual
9		0.00	VAT usual

- To add one, select a digit and enter a product name with its price and taxe.
- To remove one, leave blanck product and price, and next, click on Submit button to save your changes.

> Usage with prefix (Default: ***37**), is able to add some drinks to the room, which will be used during the billing.
> When the chambermaid cleans the room, she could check the mini-bar and enter all drinks used by the guest.
>
> Eg: Dial *37 and when you hear the prompt dial 1 2 2 followed by * (* to save your order)
> *1 could be a Coca, and 2 could be a Whiskey.* So 1 Coca and 2 Whisky, total 3 drinks.

Restaurant Settings

- Navigate to **Config > Restaurant Settings**
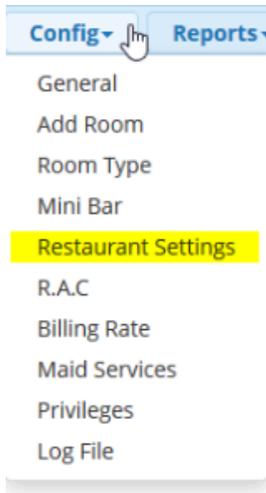
- You can enter much products for the restaurant and bar here. These products will be used for the hotel's customers when lunching or other else.

- Click on **Add Product** button to add a product.
- Put a reference in the field: **Ref** .
- Enter a product type to make some difference between bar and restaurant or other else.
- Enter a product label.

- Select a charge for your product.
- Select a image to illustrate your product. (Useful for the banner).
- Once done, click on Submit button to save your product.

Also, you can edit and delete any proctuct clicking on pencil and trash icon on left of row.

Click on **+** or **-** to show or hide the product pricture.

Now that Property Manager is configured, navigate to Property Manager Dashbeoard for Staff and End-User details

> Please restrict the group to allow what you want the users in the group to be allowed to. By default all the options are allowed