The comprehensive set of technical instructions contained within, are designed to assist Member hotels with the necessary steps to implement Express Check Out. The four methods included are:

- **Enable Express Check Out by printing and delivering a folio statement to each Guest room**
- **Enable Express Check Out by sending a folio statement to departing Guest email**
- **Allow Express Check Out using the Guest room telephone**
  - Additional hardware and software purchases may be required to provide the necessary interfaces. Please be advised that the support of these features will vary by PMS vendor.
- **Allow Express Check Out using the Guest room television**
  - Additional hardware and software purchases may be required to provide the necessary interfaces. Please be advised that the support of these features will vary by PMS vendor.
I. **How to Configure a Prompt for Printing During Checkout**

CloudPM can be configured to automatically prompt the user to print the guest folio at checkout. If this functionality is not activated the user will have to remember to complete the printing/email process. This could lead to longer checkout times and folios getting missed.

1. From the Main screen of CloudPM click on ‘Reports’ from the left navigation bar

2. When the Reports Module opens expand the tree list under ‘Print Options’ from the left navigation bar

3. Select the ‘Folio’ option from the submenu
4. The Report Options – Guest and Group Folios screen will open, to enable the setting click the checkbox next to ‘Prompt Folio print at check-out’

5. Click the ‘Save’ icon at the top of the screen to implement the changes

   a. If successful the below confirmation will display

   ➤ A prompt will now display to the user asking if a folio should be printed when a guest checkout is performed

   ➤ There is also a section to edit ‘Folio Comments’ if needed
II. How to add an Email address to the folio during Check In

1. On the Main screen under the Reservation Module click on ‘Reservation’ under the ‘Find’ header

2. The Reservations – Retrieve screen will display

3. From the top menu options click on the dropdown list where it says ‘All Guests’ and select ‘Expected Arrivals’

4. Click the dropdown next to ‘Max # of Guests to Retrieve’ select ‘All’ to display all records

5. Click on ‘Search’ to display the results
6. Click on the ‘Confirmation #’ in blue or click on the ‘Magnifying Glass’ icon and select ‘Guest Info’ to view the reservation

7. The Reservation screen will open, click in the ‘Email’ field and type in the guests email address
8. When you finish typing the email address you will receive the Opt In/Out for Best Western offers
   a. Make your selection based on the guest preference.

9. Click on the icon from the menu on the top of the Reservation screen to save the changes
   a. The system will require you to save changes prior to checking in the guest

10. A window will display confirmation of the save, click ‘OK’

11. Click on the icon from the top menu bar of the Reservation screen

12. The Room Availability screen will open if you have not already assigned a Room Number
   a. Select a Room by clicking on the row of the ‘Room Number’ you wish to assign and click ‘OK’
13. The Form of Payment screen will open, validate or select the form of payment

14. Click ‘OK’

15. Proceed through the payment screens and you will receive confirmation of check in
III. How to Check out and manually Post payment

1. From the left navigation bar on the Main screen click on ‘Reservation’ under the ‘Find’ section

2. The Reservations – Retrieve screen will display

3. From the top menu options click on the dropdown list where it says ‘All Guests’ and select ‘Today’s Departures’

4. Click the dropdown next to ‘Max # of Guests to Retrieve’ select ‘All’ to display all records

5. Click on ‘Search’ to display the results

6. Click on the ‘Magnifying Glass’ icon or Right Click next to the guest record and select ‘Folio’
7. The Folio window will open, click on the ‘Check Out’ icon from the menu bar at the top of the screen
   a. This will create a new line item that defaults to the method of payment used when the guest checked in or changed during their stay.

8. Continue with the default payment method or click on the ‘Department’ drop down and select the Form of Payment
   a. The Credit (payment amount) is defaulted with the balance due, this can be manually changed

9. Click on the ‘Save’ button to save the posting and you will receive confirmation of a successful checkout
IV. How to manually Print the folio during Checkout

If you activated the ‘Print Prompt during Checkout’ you will receive the Print Folio screen after the confirmation of a successful checkout

1. Select the option to print all folios or an individual (A-F)

2. Click ‘Yes’ and the Print Preview window will open

   a. Depending on what program you have loaded on your computer you could receive the below prompt

      ➢ if so select ‘Yes’ to print immediately

3. To print from the preview screen click on the ‘Printer’ icon at the top of the screen
4. The hotel’s standard Printer Options window will open, click on ‘Print’

If you did not activate the Print Prompt, in order to print a folio you will need to click on the ‘Forms’ tab from the top menu bar on the Reservation screen. Then select what folios to print (A-F) and click on the ‘Folio’ icon. The Print Preview screen will then display to complete steps 3 & 4 (listed above)

V. How to Email the folio during Checkout

CloudPM does not currently support the automatic emailing of a guest folio upon checkout.

If you activated the ‘Print Prompt during Checkout’ you will receive the Print Folio screen after the confirmation of a successful checkout. This process is very similar to printing.

5. Select the option for all folios or an individual (A-F)

6. Click ‘Yes’ and the Print Preview window will open
a. If you receive the prompt asking if you want to allow the printing of the document select ‘No’

➤ If you would like a copy printed in addition to your email then select ‘Yes’

7. If an Email Address was saved to the reservation in the ‘Email’ field, the email address will automatically be displayed in the Email textbox (To: field at the top of the Preview screen)

a. If no email was saved to the reservation you will have the ability to manually enter one

8. Click the ‘Email’ icon directly to the right of the Email textbox

9. This will send a copy of the folio to the email address listed, from the CloudPM system
10. Once the email and attached folio are sent to the designated recipient, CloudPM will respond with a confirmation notice that the email was sent successfully.

If you did not activate the Print Prompt, in order to email a folio you will need to click on the ‘Forms’ tab from the top menu bar on the Reservation screen. Then select what folios to print (A-F) and click on the ‘Folio’ icon. The Print Preview screen will then display to complete steps 7 - 10 (listed above).

VI. Batch-Printing Utility

CloudPM offers a utility for batch-printing Guest Folios for departures. After Night Audit (of Close Day) has been completed, a Night Auditor or Hotel employee can print departure folios for the new business day. This should never be done prior to the completion of Night Audit to ensure that all Room Charges, package postings, and special request fees are posted for the final night of the guest stay.

1. From the Main screen click on ‘Reports’ from the navigation bar
2. The Reports Module will open, expand the tree list under ‘Reservation Reports’
3. Select ‘Print RegCards/Folios’ from the submenu
4. The Print Reg Cards/Folios page will open, on the top of the screen in the Type section select ‘Departure Folios’
5. Click on ‘Print Forms’ in the Forms section
a. If there are expected departures for the business date, the folios will be prepared by the report/form viewer

6. To print a copy of the folio for each departing guest, click on the ‘Printer’ icon

Note: Copies of the guest folio, if not prepaid, will not show the final payment if the guest is paying for their stay at checkout.

VII. How to check out via the Television

Several interfaces offer Express Checkout features. The LodgeNet movie/television interface and similar systems offer Account Review/Checkout with their guest services feature. This allows guests to review their charges and checkout of their room without having to go to the front desk.

The guest folio that displays on the in-room TV lists all postings along with the current balance. However, if a confidential rate has been posted on the account, only the guest name is displayed. The guest is then directed to obtain account information from the front desk and will not be able to see the balance or any of the postings that have been made.

Once guests go through the options on the TV to display their account information, list of charges, and current balance, they will have an option to check themselves out of the room. However, this is valid only on the date of departure listed on the guest's account in the PMS, and when the guest's payment method is not restricted from completing the in-room checkout feature. When this occurs, the television/entertainment system sends a checkout message to the PMS, which will check the guest out, and notify the front desk. A folio showing final payment will print at the front desk, which if preferred, a guest may pick up a copy of their final Folio receipt, without having to wait in line at the front desk to check out.
SUMMARY

Following the instructions detailed above will provide you with the ability to choose one of several methods of Express Check Out:

1. Prepare and Print folio statement for delivery to Guest Rooms.
2. Prepare folio statement for delivery to Guest via email

To enable your PMS interface for Express Check Out by Guest room television, additional equipment is required in most instances. Your PMS vendor can assist you with information regarding purchasing and installing the correct interface, guest room equipment and hardware. Please be advised that the support of these features will vary by PMS Vendor.

RESOURCES

PMS Vendor: Assistance with PMS technical support. Call or email:

602-870-4200 or help@msisolutions.com

Best Western Property Systems Help Desk: Able to assist you with PMS procedures. Email to:

propsys@bestwestern.com

Regional Service Manager: Assistance with Express Check Out process and questions. Email direct.