



AAXSYS TECHNOLOGY

“Workin’ It”

A Set Up Guide

For

Members & Users



Setting Up Your Aaxsys System For

- 1. Overview**
- 2. Setting Up Companies**
- 3. Reservation Preferences**
- 4. Creating ‘Holds’**
- 5. Creating Blocks**
- 6. Viewing Units**
- 7. Creating Reservations**
- 8. Guest Main Page**



Workin’ It – An Aaxsys User’s Guide Reservation Board Set Up Options

Once Unit Detail and Additional Rates are set up Reservations will operate automatically. All Inventory displays to allow Reservation options, and these in turn organize all reservation board functions.

“COMPANIES”

This database is the LAST to be inputted before entering ‘guest’ reservations. Once this is completed Aaxsys will automatically populate every reservation form with the company information and store all reservations accordingly. Statistics for marketing are then captured to track occupancy; revenue; average length of stay; and various other itemized statistics.

“HOLDS”

“Holds” are for Reservations that are ‘Pending’ but not yet ‘Confirmed’. They disallow another reservation request for the length of the hold. ‘Holds” in your Aaxsys System automatically disappear after 24 hours, however in Member Configuration they can be customized to support longer periods to accommodate your business needs.

“BLOCKS”

There are four types of Blocks in Aaxsys. They are important to accurately calculate Occupancy statistics

Off-Line Blocks: These are used at the end date of a unit being on line -whether the end of a lease or The unit has been removed from Inventory. The “Availability To” date in the Unit Going Off Line needs to be entered as well to accurately calculate Occupancy

Provider/Owner Blocks: These blocks are essentially ‘guest stays without Payment’. It is important To use these when the Unit is occupied but no revenue is to be received.

Maintenance Blocks: Maintenance Blocks are just what they say. Use these to block off an On Line unit that either needs: They will compute statistically for your records

1. Maintenance & Repairs
2. Cleaning
3. Or for setting up furniture before a guest arrival

Special Blocks: **SPECIAL (OVERLAID) ADMINISTRATIONAL BLOCK**
Use this block to mark special periods within a normal reservation. Normally, overlaying a block on a reservation would be rejected by Aaxsys as an overbooking. The meaning of a special block is free. Use the "reservation note" to convey the related information.

“RESERVATIONS”

This is the application that drives all of your multiple scenarios and accounts receivable to organize your guests and revenue with respect to receivables for your company. It is crucial to set up your Inventory, rates and companies first for Maximum efficiency in utilizing your Aaxsys System. The scenarios and applications for this section will be enumerated in detail in this Workin; It Guide.



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**A Set Up Guide
For**

RESERVATIONS

Setting Up Companies”



Workin’ It – An Aaxsys User’s Guide Setting Up Companies

THIS is the last Database you MUST set up before inputting reservations. It will ‘populate’ reservation information automatically when used and keep ALL guests with Companies for Marketing Statistics

1. Click on ‘Add a New Company’ – the last application in your Client-Guest-Resident Menu

Guests

Add a New Company

2. The Company Entry Form Displays – Input ALL information
 - a. Use ‘Simple’ Company Codes

Company entry page

New Company Information	
Company information	
Company code	<input type="text"/> (8 chars, no spaces/special chars)
Company Name/Description	<input type="text"/> (35 chars)
Company is Active	<input type="radio"/> YES <input checked="" type="radio"/> NO
Address(1)	<input type="text"/>
Address(2)	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
Zip	<input type="text"/>
Country	<input type="text"/>
Website	<input type="text"/>
Contact information	
Contact Name	<input type="text"/>
Contact Phone	<input type="text"/>
Contact Fax	<input type="text"/>
Contact Email	<input type="text"/>
Comment	<input type="text"/>
Agent (user code)	<input type="text"/>
Source (code, 8 chars)	<input type="text"/>
Password for logon (max 16 chars)	<input type="text"/>
<input type="button" value="Add Company"/>	



Setting Up Companies (cont)

- b. You MUST create a Company Code for each Contact at a Company requiring Reservations
 - a. Aaxsys will e-mail the Invoice to the ‘address’ inputted here
 - b. If there is a centralized Contact for invoices then ONLY one Company code is needed.
- 4. Click on ‘ADD’ Company
- 5. Click on View & Edit Company Information from your GUEST Main Menu
- 6. Click on “View & Edit” Company Information & Proceed

Company selection page

Selection criteria	
<input type="text"/>	Company code (empty, partial or full)
<input type="text"/>	Primary address (text anywhere in street address)
<input type="text"/>	Company name (text anywhere in Company name)
<input type="text"/>	City
<input type="text"/>	State (enter a 2-character code for state)
<input type="text"/>	Contact (text anywhere in contact name)
<input type="text"/>	Agent (select by the agent who created the folio)
<input type="button" value="Proceed"/>	

- 7. Click on ‘Proceed’

Company query results

Current Companies					
Company code	Name	Address	City	State	Contact
AAXSYSKF	AMSI-SF	2800 Van Ness Ave	San Francisco	CA	Kimberly Faggianelli
AMEX	American Express	465 California St.	San Francisco	CA	Dani Parker
BAINCO	Bain & Company	1 Embarcadero Center	San Francisco	CA	Einar Aarsheim
IBMSEJ	IBM	101 California St.	San Francisco	CA	Jane Jones

- 8. All Companies Codes & Contact information can be “viewed” & “edited” from this Application.
- 9. Companies can also be ‘deleted’ from this application.
- 10. Click on ‘Edit’ under your Action Category to view & edit Company Detail



Setting Up Companies (cont)

[List of Guests belonging to this Company](#)
[Copy this company record to a new user record](#)

Company Information (AMEX)	
Basic information	Other information
Active: YES <input checked="" type="radio"/> NO <input type="radio"/>	Contact: Dani Parker
Name: American Express	Phone: 415-447-2007
Address(1): 465 California St.	Fax: 415-441-9296
Address(2): Ste # 5665	Email: dparker@amex.com
City: San Francisco	Federal Tax Id: 94-2223422
State: CA	Agent code: amex
Zip code: 94111	Source code: DM-KH
Country: USA	Logon password: ●●●●●●
Website: www.amex.com	
Comment: Preferred Client with Login Powers to Book directly	
<input type="button" value="UPDATE"/>	

- 12. The Company can be 'deactivated' & recalled later instead of 'deleted'
- 13. Click on 'List of 'Guests' belonging to this Company at the top of your Company Detail Form;

**Client query results for
American Express**

Current Guests								
Unit	Number	Last Name	First Name	Company	Begin Date	End Date	Conf Code	Agent
DNLG1101	131331	Mahar	William	AMEX	02/15/2007	04/15/2007		aaxsyszs
DNLG9321	131332	Benson	Elliott	AMEX	02/15/2007	04/15/2007		aaxsyszs
FSBC2806	131345	lawfirm	frank	AMEX	03/07/2007	04/07/2007		aaxsys
MIDTOWN1	131347	duden	denise	AMEX	03/07/2007	04/07/2007		aaxsysds

- 14. Aaxsys 'retains' EVERY reservation with the Company
 - a. From this Application you can 'click' through to see Unit detail & Client details
 - b. Company Codes allow Aaxsys to Calculate Reservation Statistics per Company
- 15. ALWAYS USE Company Codes to AUTOMATICALLY Populate the reservation form
- 16. Click on Copy the Client to a new User Record to populate an "external User Code" allowing this contact to book their OWN reservations directly into your AAXSYS Reservation board!!!!

[Copy this company record to a new user record](#)



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**“The Reservation Board
An Overview”**



“Viewing the Reservation Board” (cont.)

- 4. Choose “strict availability” for limiting the reservation board to ‘specific chosen dates’ of a request

Selection criteria

7/12/2010

7/31/2010 Strict availability

			J	U	L	J	U	L	J	U	L	J	U	L	J	U	L	A	U	G																						
Code	Address	RET/D	BB	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S				
				5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3									
EXTRA1	3888 Duke Of York BI 250	2/2						A	D																																	
EXTRA3	3888 Duke Of York BI 250	2/2							A	D																																

- a. Only units available during the designated time period will display.
- b. Reservations can then be made by clicking on the unit code

- 5. Click on the date field to start your reservation board forward or backward at any date

Selection criteria

07/22/2010 Reservation begin date

08/22/2010 Strict availability Reservation end date (Common) Pool

- 6. Set your default Reservation board to Monthly, Weekly, or Daily to display Rates

Monthly Weekly Daily Max rent

Showing rates

- a. Click on Member Configuration under Administration to set your default rate

[Member Configuration](#)

- b. Click on ‘Miscellaneous Options in your right top menu

- [Configure Search Availability](#)
- [Credit Card interface](#)
- [Miscellaneous options](#)

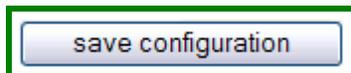
“Viewing the Reservation Board” (cont.)

- c. Click the Radio Button for your Rent Type default at the top Left of the page

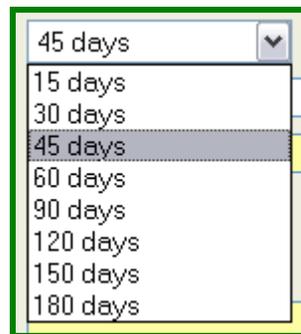


1. This can be manually overridden in Preferences
2. The default rent type will populate your reservation form with unit rates
3. Rates can be overridden in the reservation form as well

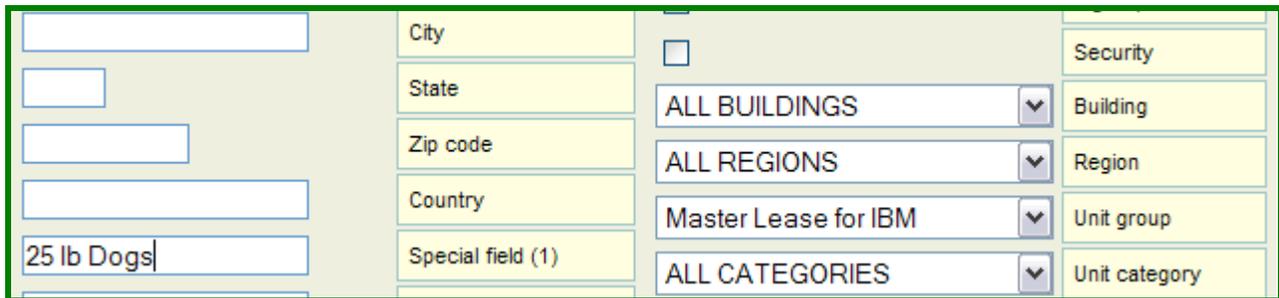
- d. Remember to click on **SAVE** at the bottom of the screen or changes will be lost



- 8. Scroll your Res-Board 15 to 180 days forward from the date(s) you choose in the top date fields



- 9. Specials fields are custom defined in your Unit Detail screen to be used as filters
- 10. Regions; Groups; and Categories are also user custom defined for filtering



- 11. Aaxsys has two reservation boards for furnished & unfurnished rental properties
 - a. The Preferences default to furnished



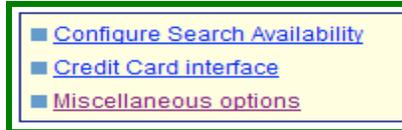


“Viewing the Reservation Board” (cont.)

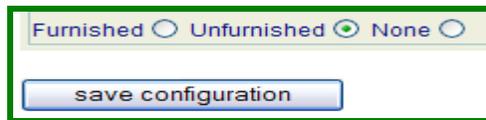
- b. Click on “Member Configuration” under Administration To default to ‘Unfurnished



- b. Click on ‘Miscellaneous Options” in your right top menu



- C, Scroll to the bottom of the Page and choose Unfurnished & remember to **SAVE**



- 12. Click on the option of displaying Guest last names or Company names on your reservation board



- 13. Once All filter Selections are made Click “Proceed” to display the reservation board

Use scrolling reservation board (browser dependent - works well only for certain browsers!)

Selection criteria

<input type="text" value="6/1/2010"/>	Reservation begin date		
<input type="text" value="9/30/2010"/> <input checked="" type="checkbox"/> Strict availability	Reservation end date	<input type="checkbox"/>	(Common) Pool
<input type="text" value="1"/>	Bedrooms	<input type="checkbox"/>	Jacuzzi
<input type="text" value="2000"/>	Max rent	<input type="checkbox"/>	Sofabeds
<input type="radio"/> Monthly <input type="radio"/> Weekly <input checked="" type="radio"/> Daily	Showing rates	<input type="checkbox"/>	Cable
<input type="text"/>	Unit code filter	<input type="checkbox"/>	Parking
<input type="text" value="180 days"/> ▾	Board extension	<input type="checkbox"/>	Pets (accepted)
<input type="text"/>	Neighborhood	<input type="checkbox"/>	Smoking
<input type="text" value="San Diego"/>	City	<input type="checkbox"/>	High-speed internet
<input type="text"/>	State		Security
<input type="text"/>	Zip code	<input type="text" value="LAVITA"/> ▾	Building
<input type="text"/>	Country	<input type="text" value="Downtown San Diego"/> ▾	Region
<input type="text" value="60 lb dog"/>	Special field (1)	<input type="text" value="Master Lease for IBM"/> ▾	Unit group
<input type="text"/>	Special field (2)	<input type="text" value="Rental Housing - Near Hospit"/> ▾	Unit category
<input type="text"/>	Special field (3)	<input checked="" type="radio"/> Show furnished Units <input type="radio"/> Show unfurnished Units	
<input type="text"/>	Special field (4)	<input type="radio"/> Show guest names <input checked="" type="radio"/> Show company names	



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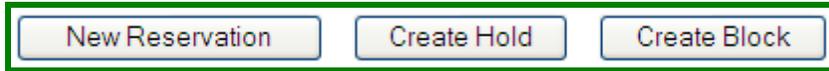
Members & Users

“Creating ‘Holds’



Creating 'Holds' (cont.)

4. Click on the Unit Code to create 'holds' 'blocks' & 'reservations'



5. Click on 'Create Hold'

Hold information (Member: AAXSYS)

Reservation Agent aaxsyszs

Unit code

Hold begin date

Hold end date

Reservation note: (max 50 chars)

- a. Click on the Dates and set the required 'dates' for your 'hold' & "submit"
- b. The 'Hold' is now engaged but will ONLY Appear once you either 'login' again or "Refresh"

Code	Address	RET/M	BB	AUG							SEP																										
				S	S	M	T	W	T	F	S	S	M	T	W	T	F																				
CHDV0999	1021 Ogden Street	3200	1/1	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	
DNLG1101	900 Bush St.	3200	1/1	A	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	D
DNLG9321	900 Bush St.	3200	1/1																																		
FSBC2417	201 Harrison	3200	1/1	A	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	H	D

- c. Aaxsys Defaults all 'HOLDS' to disappear in 24 hours.

6. To 'customize' "Holds" for your Reservation Board Click on "Main Menu Options"



7. Click on "Member Configuration" under your "Administration Menu"





Creating ‘Holds’ (cont.)

8. In the ‘Top’ Menu Click on ‘Miscellaneous Options’



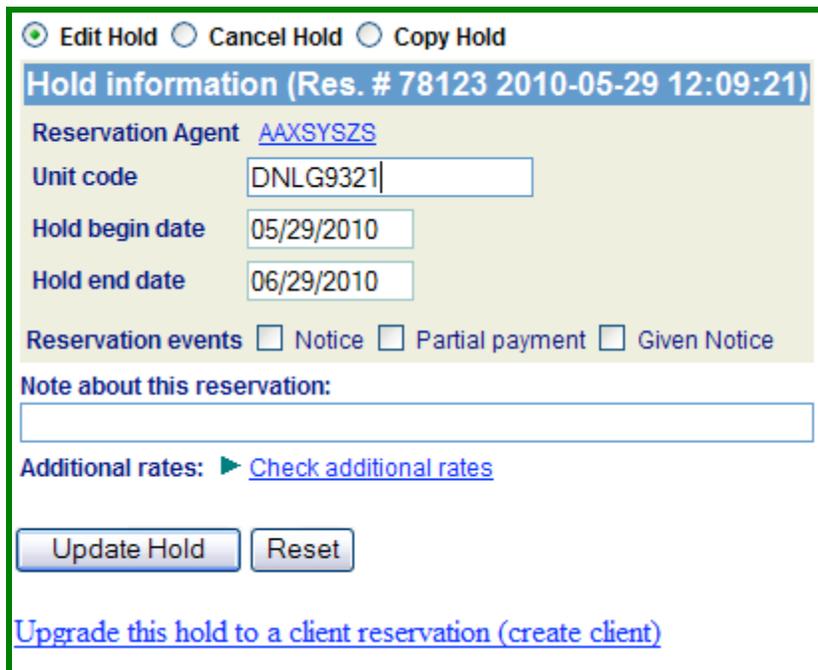
a. At the Top on the left ‘holds’ can be increased or decreased in numbers of hours



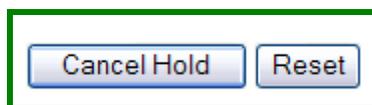
***** Remember to UPDATE Your Configuration at the bottom of the Screen*****

b. Aaxsys will NOW Automatically ‘remove’ holds after this length of time

9. ‘Holds’ can be Edited; Cancelled; Copied; or Upgraded to a reservation when confirmed



- a. To edit dates or change property codes simply input the new code or dates and ‘Update’
- b. To Cancel – click on the radio button at the top the Update will change to ‘cancel’ & Click





Creating ‘Holds’ (cont.)

- c. To Copy a Hold Click that radio button at the top – the Update changes to ‘Start Copying’



- d. The following Screen appears

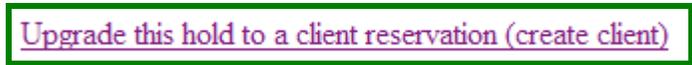
Please enter new Unit code:

[Link for interactive code selection](#)

1. Use Copy when you want to leave the first hold and add more of like kind
2. Click on “Link for interactive code selection” to choose ties from a list
3. The Selection Page Displays to choose parameters or just Click on “Proceed”
4. Choose from the List or Copy and Paste the unit Code to Copy to

Current Units							
Unit code	Pictures	Address	Crosstreets	Neighborhood	City	Bed	Bath Action
DNLG1101	Yes	900 Bush St.		South of Market	San Francisco	1	1 Edit Select
DNLG9321	Yes	900 Bush St.		South of Market	San Francisco	1	1 Edit Select

- 10. To Upgrade the Hold to a Reservation you do NOT need to Cancel it. Click on the link:



- 11. The Reservation form Displays with the Hold dates and Unit number already populated

Reservation information (Res. # 78123 Member: AAXSYS)

Reservation Agent: AAXSYSZS

Client Last Name:

Client First Name:

Unit code: DNLG9321

Reservation begin date: 05/29/2010

Reservation end date: 06/29/2010

of People:

Has pet(s): Company:

Contact:

Rent type: D /Day /Night

Rent:

Deposit:

Departure Services:

Tax (%):

Additional rates: [Check additional rates](#)

This address is: Business Personal

Use for billing: YES NO

Address 1:

Address 2:

City:

State:

Zip:

Country:

(Contact) Phone:

Email:

Credit card:

Holder:

Expiration date: May 2010



AAXSYS TECHNOLOGY

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“Creating ‘Blocks’”



Creating ‘Blocks’ (cont.)

- 4. Blocks can be ‘Cancelled’ or ‘Copied’ by Clicking on the underlined ‘A’ or ‘B’ on the Reservation board
 - a. Click the radio button to Edit; Cancel; or Copy
 - b. The link at the bottom will reflect the action you want to take

Edit Offline Block Cancel Offline Block Copy Offline Block

Offline Block information (Res. # 80556 2010-07-18 14:17:53)

Reservation Agent [AAXSYSZS](#)

Unit code

Offline Block begin date

Offline Block end date

Additional rates: [▶ Check additional rates](#)

Reservation events Notice Partial payment Given Notice

Note about this reservation:

- b. OWNER/PROVIDER Blocks
 - 1. Click the radio button for Owner/Provider blocks

Offline block Owner/Provider block Maintenance block Special (overlaid) block [Guideline](#)

- 2. These blocks are used for guest stays or if owners or inventory providers place guests at no compensation or accounting for the company

Block information (Member: AAXSYS)

Reservation Agent aaxsyszs

Unit code

Block begin date

Block end date

Reservation note: (max 50 chars)



Creating 'Blocks' (cont.)

- d. Special 'Overlaid' Blocks
 - 1. These Blocks can be used for many different reasons
 - a. No money is received on booked reservation
 - b. Past Guest owes money for reservation but left
 - c. New guest overlaps old reservations
 - 2. They allow minimal 'over-booking' which is NOT possible otherwise
 - 3. Click the Radio Button on 'Special Block'

Offline block
 Owner/Provider block
 Maintenance block
 Special (overlaid) block
 [Guideline](#)

Block information (Member: AAXSYS)

Reservation Agent aaxsyszs

Unit code

Block begin date

Block end date

Reservation note: (max 50 chars)

- 5. Both the 'Special Block and the reservation or other block can be accessed

Code	Address	RET/D	BB	JUL							AUG																																		
				S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
DNLG1101	900 Bush St.	100	1/1																																										
DNLG9321	900 Bush St.	100	1/1																																										
FSBC2417	201 Harrison	100	1/1																																										
FSBC2806	201 Harrison St.	100	1/1																																										

- 6. Click on the Underlined 'S' to review the Special Block

Reservation Listing											
Res #	Name	Property	Begin date	End date	Type	Res.Date	Note	# People	Pets	Agent	
80562	Clinton,Bill	FSBC2806	2010-07-22	2010-08-22	Reservation	2010-07-18		1		aaxsyszs	
80563		FSBC2806	2010-07-31	2010-08-31	Special/Admin	2010-07-18	No \$\$ in on Clinton - Block for Rodman Booking			aaxsyszs	

- 7. Both the Reservation & Special Block are viewed in detail by clicking the Number
- 8. Again the Special Block can be edited; copied or canceled from the Block screen
- 9. Special Blocks simply expedite a 'quasi' overbooking for any reason



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**“Viewing Units
On the Reservation Board”**

Workin’ It – An Aaxsys User’s Guide “Units on the Reservation Board

1. Click on ‘Reservation Board’



2. Sort your ‘Reservation Preferences’ Page for the ‘style’ and ‘information you wish to see:

Reservation preferences

Use scrolling reservation board (browser dependent - works well only for certain browsers!)

Selection criteria

<input type="text" value="08/03/2008"/>	Reservation begin date	<input type="checkbox"/>	<input type="text" value="Pool"/>
<input type="text" value="09/03/2008"/> <input type="checkbox"/> Strict availability	Reservation end date	<input type="checkbox"/>	<input type="text" value="Jacuzzi"/>
<input type="text"/>	Bedrooms	<input type="checkbox"/>	<input type="text" value="Sofabeds"/>
<input type="text"/>	Max rent	<input type="checkbox"/>	<input type="text" value="Cable"/>
<input checked="" type="radio"/> Monthly <input type="radio"/> Weekly <input type="radio"/> Daily	Showing rates	<input type="checkbox"/>	<input type="text" value="Parking"/>
<input type="text"/>	Unit code filter	<input type="checkbox"/>	<input type="text" value="Pets (accepted)"/>
<input type="text" value="45 days"/> ▼	Board extension	<input type="checkbox"/>	<input type="text" value="Smoking"/>
<input type="text"/>	Neighborhood	<input type="checkbox"/>	<input type="text" value="High-speed internet"/>
<input type="text"/>	City	<input type="checkbox"/>	<input type="text" value="Security"/>
<input type="text"/>	State	<input type="text" value="ALL BUILDINGS"/> ▼	<input type="text" value="Building"/>
<input type="text"/>	Zip code	<input type="text" value="ALL REGIONS"/> ▼	<input type="text" value="Region"/>
<input type="text"/>	Country	<input type="text" value="ALL GROUPS"/> ▼	<input type="text" value="Unit group"/>
<input type="text"/>	Special field (1)	<input type="text" value="ALL CATEGORIES"/> ▼	<input type="text" value="Unit category"/>
<input type="text"/>	Special field (2)	<input checked="" type="radio"/> Show furnished Units <input type="radio"/> Show unfurnished Units	

3. Choose “scrolling res board” at the top of your screen for viewing large ‘blocks’ of units
4. Choose “strict availability” for limiting the reservation board to ‘specific chosen dates’
5. Chose Monthly, Weekly, or Daily Rates to show on the res board & Aaxsys to put in invoices

All About Reservations – Cont.

Details on FSBC2806 (The BayCrest,San Francisco)

 For reservations, send e-mail to [Aaxsys staff](#) or call 415-2097 xt 2089

▶ [Book this Unit online](#)

Neighborhood: South of Market **Address:** 201 Harrison St. **Bd 1** **Ba 1**

Daily: NO	Weekly: NO	Monthly: From 3200.00
------------------	-------------------	------------------------------




[VIEW MORE PICTURES...](#)

One bedroom one bath condo with contemporary Scandinavian furniture. Full-size bed. Full-size sofa-bed in living room. New carpet. Full amenity kitchen with microwave. Cable TV, VCR, stereo. Laundry in unit. Includes high speed internet, bi-monthly housecleaning and garage parking. Bay Crest's amenities offer something for everyone whether you enjoy reading by the pool, relaxing in the sauna or unwinding with an intense game of racquetball. Take advantage of living near the water's edge by running, walking or riding the historic streetcars along the Embarcadero. Located in San Francisco's hottest new area, SOMA, you will be able to take advantage of a wide variety of nightclubs, renowned restaurants, bars and Gordon Biersch Brewery. Pac Bell Park and downtown are both within walking distance as well.

AVAILABLE AMENITIES

- ☀ Oven
- ☀ Microwave
- ☀ DishWasher
- ☀ TV/Cable
- ☀ DVD
- ☀ High speed internet
- ☀ Washer/dryer:In Unit
- ☀ Pool
- ☀ Healthclub

ADDITIONAL FEATURES

- ☺ **Unit Accommodates:** 2
- ☺ **Bed sizes:** Queen
- ☺ **Parking:** Space #64
- ☺ **View:** Bay Bridge

For reservations, send e-mail to [Aaxsys staff](#) or call 415-2097 xt 2089

1. All information; pictures; description; amenities; On line booking
2. Click on Aaxsys Staff to Make a request & send by e-mail

Contact Reservations

Please type your message and e-mail address below:

Recipient:	Reservations
Sender (your address):	<input type="text" value="@"/>
Phone:	<input type="text"/>
Name:	<input type="text"/>
Company:	<input type="text"/>
Reservation Dates:	<input type="text"/>
Subject:	LILV2005
Message:	<div style="border: 1px solid black; height: 80px; width: 100%;"></div>



Aaxsys Technology “Workin’ It” A Set Up Guide for Reservations

All About Reservations – Cont.

3. Click on ‘Book This Unit on Line’



[Please notice: The minimum stay for this unit is 30 days]

Reservation information (Member: AAXSYS)

Reservation Agent	AAXSYSZS	This address is	<input checked="" type="radio"/> Business <input type="radio"/> Personal
Client Last Name	<input type="text"/>	Use for billing	<input checked="" type="radio"/> YES <input type="radio"/> NO
Client First Name	<input type="text"/>	Address 1	<input type="text"/>
Unit code	DNLG9321	Address 2	<input type="text"/>
Reservation begin date	09/10/2010	City	<input type="text"/>
Reservation end date	10/10/2010	State	<input type="text"/>
# of People:	<input type="text"/>	Zip	<input type="text"/>
Has pet(s)	<input type="checkbox"/>	Country	<input type="text"/>
Company:	<input type="text"/> ▼	Phone	<input type="text"/>
Contact	<input type="text"/>	Email	<input type="text"/>
Rent type	<input checked="" type="radio"/> D <input type="radio"/> /Day <input type="radio"/> /Night	Credit card	<input type="text"/>
Rent	100.00	Holder	<input type="text"/>
Deposit	0.00	Expiration date	Sep ▼ 2010 ▼
Departure Services	150.00		
Tax (%)	0.0000		
Additional rates:	▶ Check additional rates		
Client type:	<input type="text"/> ▼	Confirmation code	<input type="text"/>

Note about this reservation:

1. For guests booking with a credit card this feature is terrific
 - a. It fills the reservation board with the guest name
 - b. Issues a confirmation automatically to the guest
 - c. Adds all the charges & payments automatically
2. Reservationists use this too to speed up the initial reservation and payment

Making Reservations – Cont.

c. Click on Unit Calendar

[View This Unit](#)
 [Unit Reservation Calendar](#)
 [Main Page for Unit](#)

1. This is a year at a glance view of availability
2. All dates booked on your reservation board are in red

(Red color indicates reserved dates)

Sep 2010							Oct 2010							Nov 2010						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4						1	2	1	2	3	4	5	6	
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27
26	27	28	29	30			24	25	26	27	28	29	30	28	29	30				
							31													

d. Click on Main Page for Unit

[View This Unit](#)
 [Unit Reservation Calendar](#)
 [Main Page for Unit](#)

1. This takes you to the Detailed information Page for the unit
2. Information can be edited – pricing etc. from this application

Detailed information on LILV2005

View This Unit	Copy to a new unit	Additional rate details
Recurrent expenses	Manage unit pictures	Upload new picture
Copy pictures from another unit	Owner/Provider list	Open documents
Guest listing	Expenses	Financial statement (balance)
Alerts	Housecleaning settings	Change unit code
Change member code		

Current Unit Features			
Active	YES <input checked="" type="radio"/> NO <input type="radio"/>	Min/max stay (days)	Min <input type="text" value="30"/> Max <input type="text"/>
Available from	<input type="text" value="9/1/2010"/> remove	Available until	<input type="text"/> remove



AAXSYS TECHNOLOGY

“Workin’ It”

A Set Up Guide

For

Members & Users

“Creating ‘Reservations’”

Workin’ It – An Aaxsys User’s Guide Creating Reservations

Your Aaxsys System is now set up to process reservations with ALL attending charges for properties and guests. This Guide populates your reservation board and instantly invoices and e-mails guests.

1. Click on the Reservation Board



2. Sort your ‘Reservation Preferences’ Page for the ‘style’ and ‘information you wish to see:

Reservation preferences

Use scrolling reservation board (browser dependent - works well only for certain browsers!)

Selection criteria

07/22/2010	Reservation begin date		(Common) Pool
08/22/2010 <input type="checkbox"/> Strict availability	Reservation end date	<input type="checkbox"/>	Jacuzzi
	Bedrooms	<input type="checkbox"/>	Sofabeds
	Max rent	<input type="checkbox"/>	Cable
<input type="radio"/> Monthly <input type="radio"/> Weekly <input checked="" type="radio"/> Daily	Showing rates	<input type="checkbox"/>	Parking
	Unit code filter	<input type="checkbox"/>	Pets (accepted)
45 days	Board extension	<input type="checkbox"/>	Smoking
	Neighborhood	<input type="checkbox"/>	High-speed internet
	City	<input type="checkbox"/>	Security
	State	ALL BUILDINGS	Building
	Zip code	ALL REGIONS	Region
	Country	ALL GROUPS	Unit group
	Special field (1)	ALL CATEGORIES	Unit category
	Special field (2)	<input checked="" type="radio"/> Show furnished Units <input type="radio"/> Show unfurnished Units	
	Special field (3)	<input checked="" type="radio"/> Show guest names <input type="radio"/> Show company names	
	Special field (4)		

Proceed

3. Click on ‘Proceed’ to access the reservation board



Creating Reservations (cont.)

[Please notice: The minimum stay for this unit is 30 days]

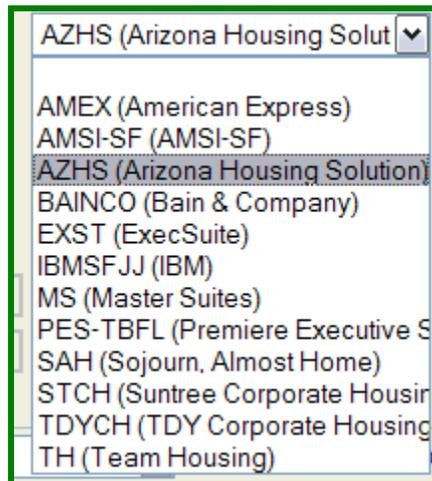
Reservation information (Member: AAXSYS)	
Reservation Agent	AAXSYSZS
Client Last Name	<input type="text" value="Last Name / Last Name"/>
Client First Name	<input type="text" value="First Name / First Name"/>
Unit code	FSBC2417
Reservation begin date	<input type="text" value="3/5/2010"/>
Reservation end date	<input type="text" value="09/05/2010"/>
# of People:	<input type="text" value="2"/>
Has pet(s)	<input checked="" type="checkbox"/>
Company:	<input type="text" value="AZHS (Arizona Housing Solut"/> ▼
Contact	<input type="text" value="Brenda Carper"/>
Rent type	<input type="radio"/> /Day <input checked="" type="radio"/> /Night
Rent	<input type="text" value="100.00"/>
Deposit	<input type="text" value="0.00"/>
Departure Services	<input type="text" value="150.00"/>
Tax (%)	<input type="text" value="0.0000"/>
Additional rates:	▶ Check additional rates
Client type:	<input type="text" value="CORPORATE"/> ▼
Confirmation code	<input type="text" value="TF3 9R4"/>
This address is	<input checked="" type="radio"/> Business <input type="radio"/> Personal
Use for billing	<input checked="" type="radio"/> YES <input type="radio"/> NO
Address 1	<input type="text" value="4281 W. Gate Keeper Dr"/>
Address 2	<input type="text" value="Ste # 103"/>
City	<input type="text" value="Tucson"/>
State	<input type="text" value="AZ"/>
Zip	<input type="text" value="85741"/>
Country	<input type="text" value="USA"/>
Phone	<input type="text" value="520-449-3706"/>
Email	<input type="text" value="brenda@azhousingsolution.com"/>
Credit card	<input type="text"/>
Holder	<input type="text"/>
Expiration date	<input type="text" value="Aug"/> ▼ <input type="text" value="2010"/> ▼

Note about this reservation:

- a. At the top of the screen the minimum stay displays
 1. The reservation can not be made for less than the amount listed
 2. All Labels in RED are mandatory fields to fill in
- b. Put in the Last Name of the Guest FIRST – then the First name
 1. If two guests are sharing without a second invoice
 2. put both last names and first names in with a “/” in between
- c. Click on the date fields to choose the beginning & end date of the reservation
- d. Fill in number of people (there may be subsidiary guests – discussed later)
- e. Check the ‘has pets’ box if accurate

Creating Reservations (cont.)

7. Click on the down arrow in the field that says Company
 - a. This engages the Company Database set up in Aaxsys Guide 2.
 - b. Choose the company record requesting this reservation



AZHS (Arizona Housing Solut) ▼

- AMEX (American Express)
- AMSI-SF (AMSI-SF)
- AZHS (Arizona Housing Solution)**
- BAINCO (Bain & Company)
- EXST (ExecSuite)
- IBMSFJJ (IBM)
- MS (Master Suites)
- PES-TBFL (Premiere Executive S
- SAH (Sojourn, Almost Home)
- STCH (Suntree Corporate Housir
- TDYCH (TDY Corporate Housing
- TH (Team Housing)

- c. All reservations are retained with the company
 - d. Reservation statistics for companies; reservations; etc. calculate for marketing purposes
 - e. Repeat individual guests can also be set up in this database
 - f. Choosing the company populates the rest of the reservation form automatically
8. Rent type daily, weekly, monthly engages from the default set in Member Configuration
9. The rent amount populates from the rates set up in your unit detail
10. Choosing a client type establishes a source code database for statistics
11. Confirmation Code
 - a. This is a source for the reservation company to track their own reservations
 - b. It can be used by travel agencies of volume reservations
 - c. It can also be used for Purchase orders



Client type: Confirmation code:

12. Any special remarks about the reservation should be entered then click “Submit”



Note about this reservation:

Creating Reservations (cont.)

13. The following Page displays:

Please confirm guest billing period

New Billing Period

The following is a suggested billing period based on reservation dates

Billing period start date: Next billing period start date:

(Billing covers the period NOT INCLUDING the billing period end date)

- a. If pro-rating to the first of the month click on ‘Next Billing Period Start Date:
1. The calendar engages
 2. Click on the date you want to bill until & click “Proceed”

<<
September
2010 >>

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

b. The following screen displays:

Type	Description	Amount	Transaction Date/Due Date
IN	Rent 08/01-08/31	3100.00	08/08/2010
IN	Departure Services	150.00	08/08/2010
Totals		3250.00	

Select the mode of reservation:

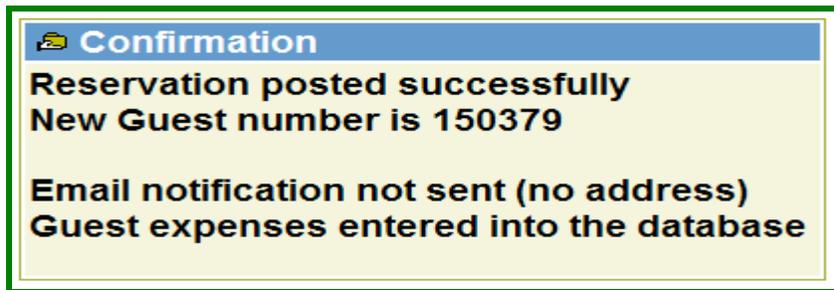
Create an invoice automatically based on the above charges

No thanks, just make the reservation without creating invoice



Creating Reservations (cont.)

- c. Check that your totals are correct
 1. ALWAYS click Create an invoice to create invoice transactions
 2. No Thanks creates no billing transactions – just populates the reservation board
- d. NO reservation has yet been made. You can go back to check dates & rates
- e. Click 'Make Reservation" to Proceed
(We will discuss create a second guest for this reservation in "Advanced Topics")
- f. An Instant Confirmation displays with the guest' number for your accounting



- g. An e-mail notification would have been sent to an authorized party if that had been inputted into your User form. Up to 5 e-mail addresses can be notified upon reservations
14. To send this reservation invoice immediately to the guest Click;

[Click here for the guest's financial statement](#)

15. Click on "Send by E-Mail to guest" to e-mail the invoice instantly

GUEST FINANCIAL STATEMENT #150379-08/08/2010				
#150379-08/08/2010				
Client/Billing address			Reservation information	
Clinton, Bill Arizona Housing Solution Contact: Brenda Carper 4281 W. Gate Keeper Dr. Tucson AZ 85741 USA			Guest No: 150379 Agent: aaxsyszs Unit: DNLG9321 Address: Phone: Start date: 08/01/2010 End date: 11/01/2010 Rent: 100.00/night	
Class	Reference #	Description	Date	Amount
CHARGES:				
	456032	Rent 08/01-08/31	2010-08-08	3100.00
	456033	Departure Services	2010-08-08	150.00
	Total charges:			3250.00
PAYMENTS:				
	Total payments:			0.00
	Balance due			3250.00
Send by e-mail to the guest				



AAXSYS TECHNOLOGY

“Workin’ It”

A Set Up Guide

For

Members

&

Users



Workin' It - An Aaxsys User's Guide Guest Main Page Functions

- To review guest information, Unit or Reservation information click on Guest Main Page

[Click here for the guest main page](#)

- The guest form holds ALL accounting information

Client Information (Client # 150379)	
Client Address	Contact/Company Address
<input type="radio"/> Use this address for billing	<input checked="" type="radio"/> Use this address for billing
LastName <input type="text" value="Clinton"/> FirstName <input type="text" value="Bill"/> Address1 <input type="text" value="1600 Pennsylvania Ave"/> Address2 <input type="text"/> City <input type="text" value="Washington"/> State <input type="text" value="DC"/> Zip <input type="text" value="10123"/> Country <input type="text" value="USA"/> Phone <input type="text" value="671-777-2345"/> Email <input type="text" value="bill.clinton@thewhitehouse.com"/>	Contact <input type="text" value="Brenda Carper"/> Phone <input type="text" value="520-449-3706"/> Email <input type="text" value="sales.aaxsys@aaxsys.com"/> Company <input type="text" value="Arizona Housing Solutio"/> (show list) Address1 <input type="text" value="4281 W. Gate Keeper Dr"/> Address2 <input type="text"/> City <input type="text" value="Tucson"/> State <input type="text" value="AZ"/> Zip <input type="text" value="85741"/> Country <input type="text" value="USA"/>

- Click the radio button above the side you want Aaxsys to invoice
- The financial section multi-tasks

Financial	Rental
Rent <input type="text" value="100.00"/>	<u>Unit</u> DNLG9321
Deposit <input type="text" value="0.00"/>	<u>Begin date</u> 2010-08-01
<u>Departure Services</u> <input type="text" value="150.00"/>	<u>End date</u> 2010-11-01
<u>Tax (%)</u> <input type="text" value="0.0000"/>	<u>Rent type</u> D
<u>Invoice code</u> (NOT ASSIGNED) ▼	<u>Show rent in invoice</u> YES <input checked="" type="radio"/> NO <input type="radio"/>
<u>Credit card</u> <input type="text"/>	<u>Hide rent from guest</u> <input type="checkbox"/>
<u>Credit card type</u> <input type="text"/>	<u>Hide rent from master</u> <input type="checkbox"/>
<u>Expiration date</u> Aug ▼ 2010 ▼	<u>Guest type</u> GOVERNMENT ▼
<u>Name (CC holder)</u> <input type="text"/>	<u># People</u> <input type="text" value="2"/>
<u>Street</u> <input type="text"/>	<u>Has pet(s)</u> NO
<u>Zip</u> <input type="text"/>	<u>Agent</u> <input type="text" value="aaxsyszs"/>
<u>Last billing</u> 2010-08-01	<u>Account code</u> <input type="text"/>
<u>Next billing</u> 2010-09-01	<u>Confirmation code</u> <input type="text" value="T47 QW5"/>



Guest Main Page (cont.)

- d. ALL databases in Aaxsys are “Independent” but “Interactive”
 1. Click on **UNIT** to view the Main Page of your Unit detail
 2. Click on **Begin date** to view the reservation form
- e. It is NOT recommended to retain CC information due to security issues
- f. Important to the system operations is “Last Billing & Next Billing – these dates instruct Aaxsys what to do next as well as accurately depict that the guest as been updated
- g. Click on **Agent** to not only VIEW agent information but automatically e-mail from Aaxsys!

User Information	
User login code	AAXSYSZS
User full name	Zoya L. Smithton
Company name	Aaxsys Technology
Address (1)	2800 Van Ness Ave
City	San Francisco
State	CA
Zip	94109
Country	USA
Email address	zsmithton@aaxsys.com
Phone number	415-447-2097
Fax number	415-22-9296

- h. The invoicing section can be set up to default in Member Configuration
 1. Invoice will automatically ‘batch’ in your billing module to update and e-mail All updated invoices to clients – unless ‘do not batch is checked
 2. Set Batch email full statement – Invoice only or invoice & balance
 3. Relationships to other clients will be discussed in ‘Advanced Features’

Invoicing	
Method	Invoice <input checked="" type="radio"/> Card <input type="radio"/> Other <input type="radio"/> <input type="checkbox"/> Do not batch email invoice/statement Last emailed 2010-08-08
Batch email invoice type	Full <input type="radio"/> Invoice only (latest period) <input type="radio"/> Balance statement (latest period) <input checked="" type="radio"/>
Relationship to Other Clients	
Master	YES <input type="radio"/> NO <input checked="" type="radio"/> Dependent YES <input type="radio"/> NO <input checked="" type="radio"/> Master client no <input type="text"/>



Guest Main Page (cont.)

- i. Arrival & Departure Information Prints on your Invoice for Special instructions
- j. Guest notes are ‘internal’ and DO NOT display – they are for internal use only
- k. Guest Invoice Notes do display for guest marketing

Arrival information

Keys in Lock Box: Combination 000734
Parking in Space # 34
Entrance for Parking is on Post St.

Departure information

Leave Keys on the kitchen counter upon departure

Guest Notes: [Click here for a larger edit window for notes](#)

Repeat Guest
Resers a 2-bedroom each August

Guest Invoice Notes: [\(Click here for a larger edit window for invoice notes\)](#)

Thank you very much for staying with Aaxsys Technology

- I. All Text boxes are separate databases and must be **SAVED** separately to retain information