

Zonal



Infor PMS

Site User Guide

v1.36.0 April 2020

The Infor logo, consisting of the word "infor" in a white, lowercase, sans-serif font, centered within a solid red square. The square is positioned in the lower-left quadrant of the page.

infor

Version	Date	Notes	Author
0.1	30-3-20	First draft	F Tait
0.2	08-4-20	Updates following internal review	F Tait
1.0	13-4-20	Initial release of the Site User Guide	F Tait

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Introduction

Document Scope

This guide is aimed at site staff and describes:

- How to use the Zonal integration to the Infor PMS system for room posting, and;
- Troubleshooting the system.

Overview

Infor PMS is a POS Integration Engine plugin that integrates with Aztec to facilitate real-time room and non-room postings against an account in the Infor Hospitality Management Solution (HMS) PMS.

Prerequisites

The following applications/version and services are required to support Infor PMS operation within Aztec:

- Aztec 3.18.0 or later at head office and site (also supported with v3.14)
- iZone POS Integration Engine v1.36.0 or later at site
- Infor PMS (API v2)

Associated Documentation



Infor PMS: Setup Guide - This guide is aimed at Zonal and head office staff that are responsible for installing the main system (and components) and configuring all areas of the system.

Site Operation

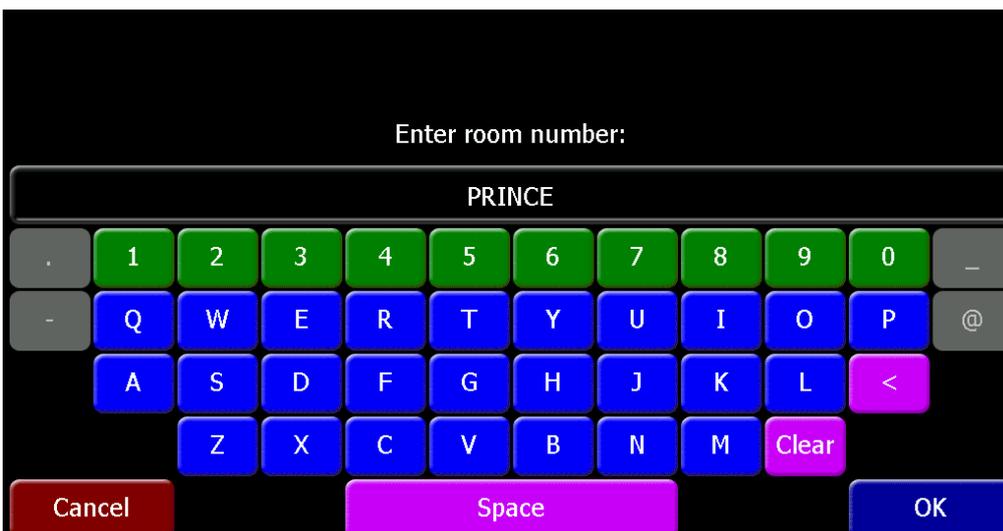
Taking room payments

Once the desired items have been rung up on the account, a server can pay off the account to a room.

Pressing the button related to the payment method (configured in *Infor PMS: Setup Guide*) will initiate a room posting.



The server is prompted to enter a room number/guest name:



Room numbers/guest name are currently limited to a maximum of 9 characters and alphanumeric characters are allowed.

The OK button cannot be selected until the first character has been entered.

Pressing 'Cancel' returns the user to the main till screen.

After a room number/guest name has been entered, the server is prompted to confirm the room number/name:



After confirmation of the room number/name, the server is prompted to enter the amount to charge the room:



From this point onwards, steps can be slightly different depending on the Overpayment configuration (configured in *Infor PMS: Setup Guide*). For this walkthrough we have set the Room Posting to assume overpayment is Tip.

If more than the total amount is entered on this screen, the difference will be treated as a tip (if the payment method is configured as overpayment = Tip).

After sending an amount (in this case the value of the account £24.01) an enquiry is sent to the Infor system to get a selection of available room accounts.

If a room number was entered, the available accounts will show all guests associated with that room, regardless of whether they are the primary or secondary guests.



Entering a name will return any guests, open house accounts or group accounts which match the text entered. It will also return any guests associated with a primary guest. Only results associated with a guest will have a room number line on the button.



As can be seen in the above image, 5 available accounts have been returned by Infor. This screen can show a maximum of 16 accounts.



It's recommended that House Accounts in Infor follow a naming convention to ensure that payment accounts are clearly identifiable.

- If the 'Show credit limit of guest' check-box has been selected when defining CLM settings, then the credit limits set in Infor will be displayed as shown in the example. The credit limit displayed is for information only and does not change when amounts are posted to a room. It remains possible to post amounts greater than the credit limit (if posting is allowed for that room).



This is the last stage that the payment to room can be 'cancelled'. After this stage the payment will be taken from the POS account.

If cancel is pressed on this screen, a transaction declined screen is shown to the user:



Selecting an account prints a receipt for the customer to sign:

Test Site
Address
Telephone

i700
Alex 13 Apr 2020 13:37
Acc No: 23

Receipt no. 72/0028
Acknowledgement of Charging
Product Group Summary
EPOSDRIN: £24.01

Total: £24.01
Tip:
Total Room Charge:

Room No: 802!
Name: MR J Appleton
Signature:
Please debit my room account
with the above total room charge
HOTEL COPY! U1 SETLP 0 2

On the till, the server is prompted to verify the signature:



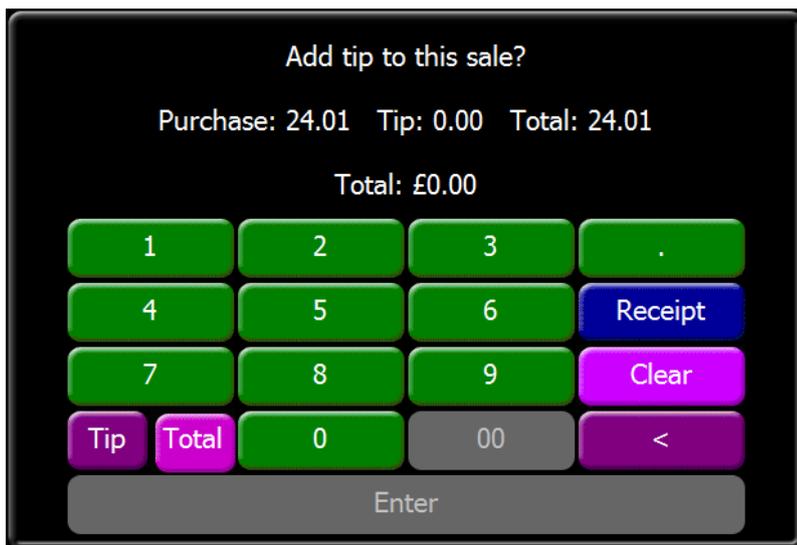
 **If the server rejects the signature, the system will attempt to reverse the payment to return the account back to its initial state.**

In this instance as the room posting accepts tips, but one was not provided as an upfront tip in the original payment the customer, the receipt printed allocates a space for the customer to add one.

If the Server accepts the signature on the receipt the transaction is approved and the following screen displayed:



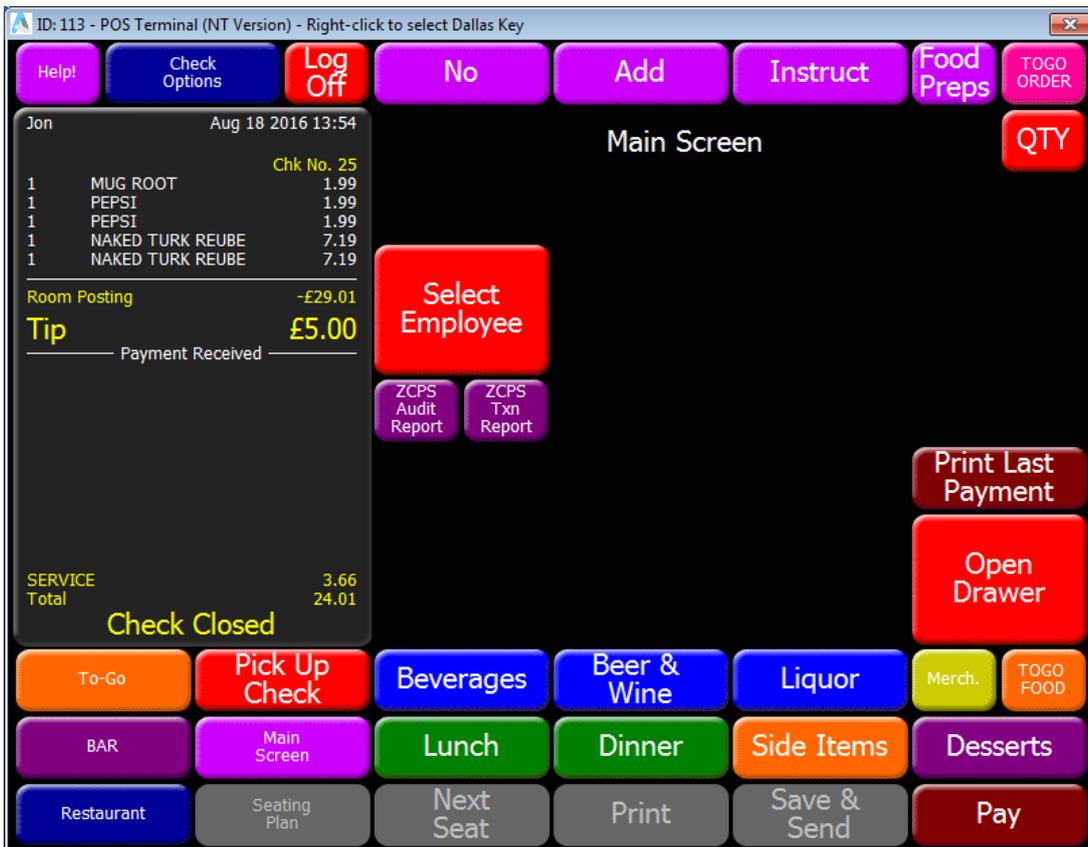
Post Transaction, as no Tip was supplied up front, but the payment method is configured to handle tips, the Server is prompted to enter any tip that was added by the customer.



Enter cannot be selected until tip amount has been confirmed. If no tip has been provided then the Server can press the Tip button and then Enter, and the sale will be completed. Otherwise they can add a tip to the payment (£5 in the example image below).

Once the tip has been supplied the POS terminal will prompt POS Integration Engine to request the tip payment. This is posted through to the Infor system.

If successful, no further prompts are displayed and the server is returned to the account, now closed and paid off if the full account balance has been posted to room.



Overpayment Variations

The variations for processing a room posting that can occur dependant on overpayment setup are:

Upfront Tip

If the server enters an upfront Tip when prompted for the original payment amount, this will be added to the initial payment request.

The tip amount is printed on the Signature Receipt, and the Server is not prompted again for a tip (post payment).

No Overpayment

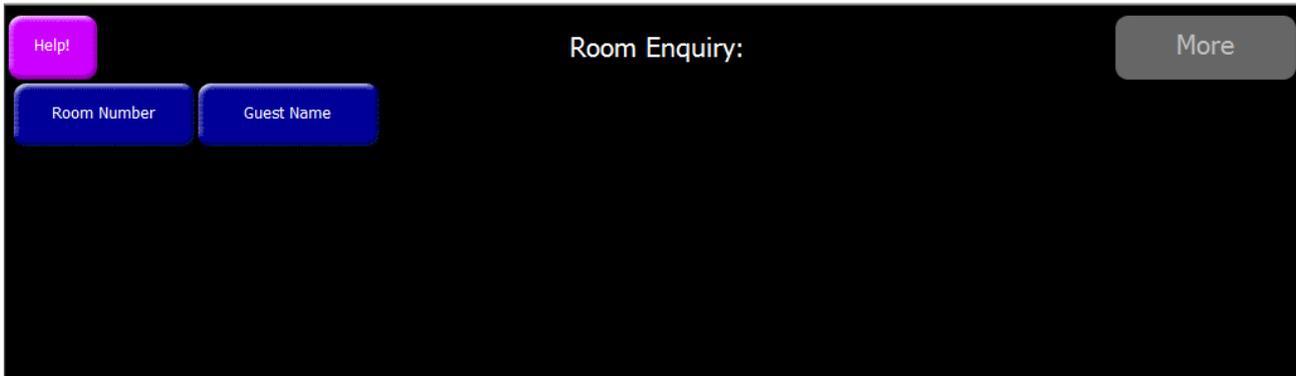
If the payment method is configured to not allow overpayment, the POS terminal does not accept an amount entered that is greater than the value of the account.

Additionally, the server is not prompted to enter a tip.

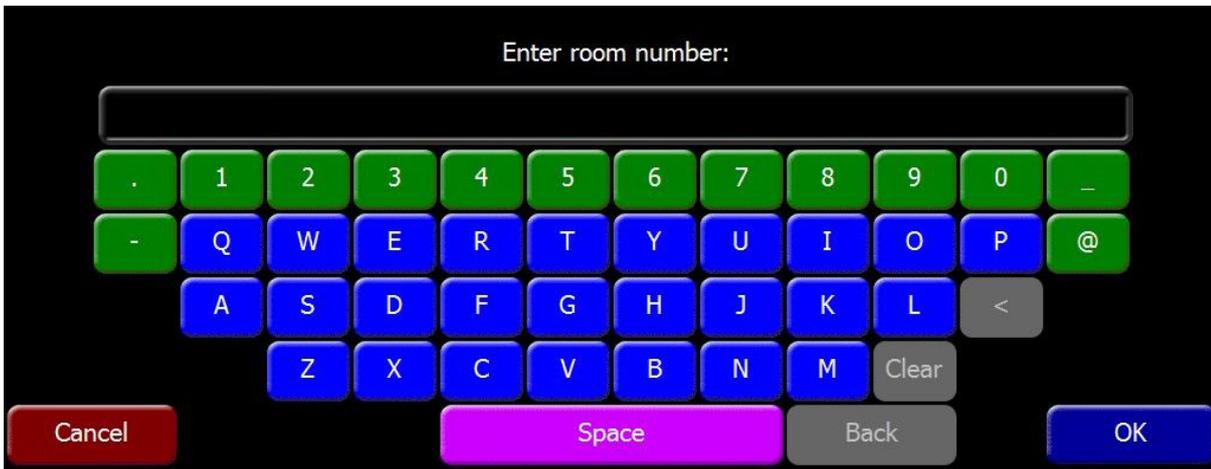
Making a room enquiry

Front of House staff can perform a room enquiry from the POS to display guest and account on-screen.

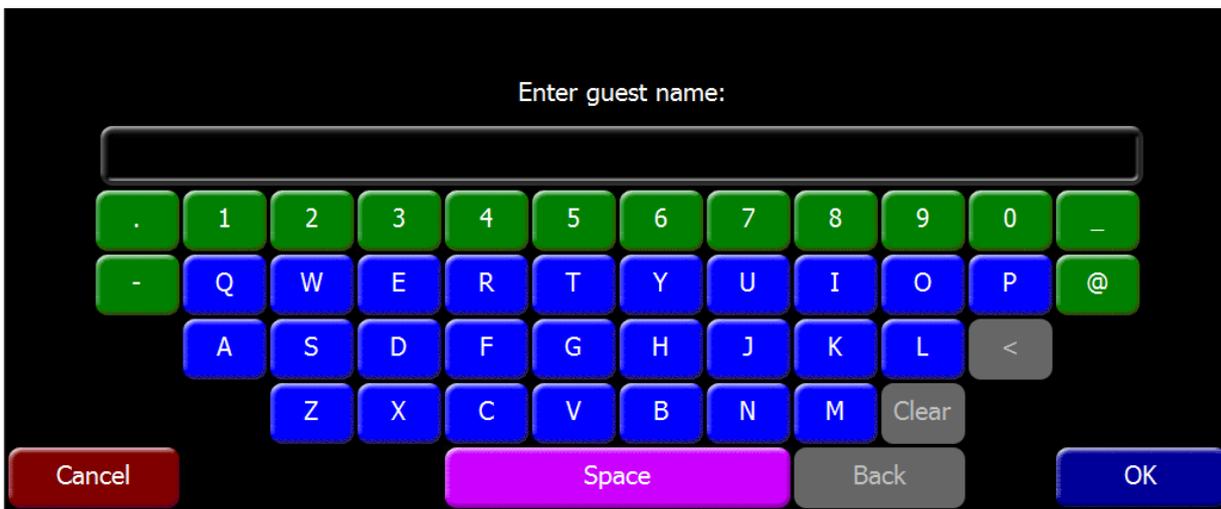
Pressing the Room Enquiry button on the POS will initiate a room enquiry and the POS user will be prompted to enquire by room number or guest name.



Selecting to enquire by room number displays the room number entry screen:

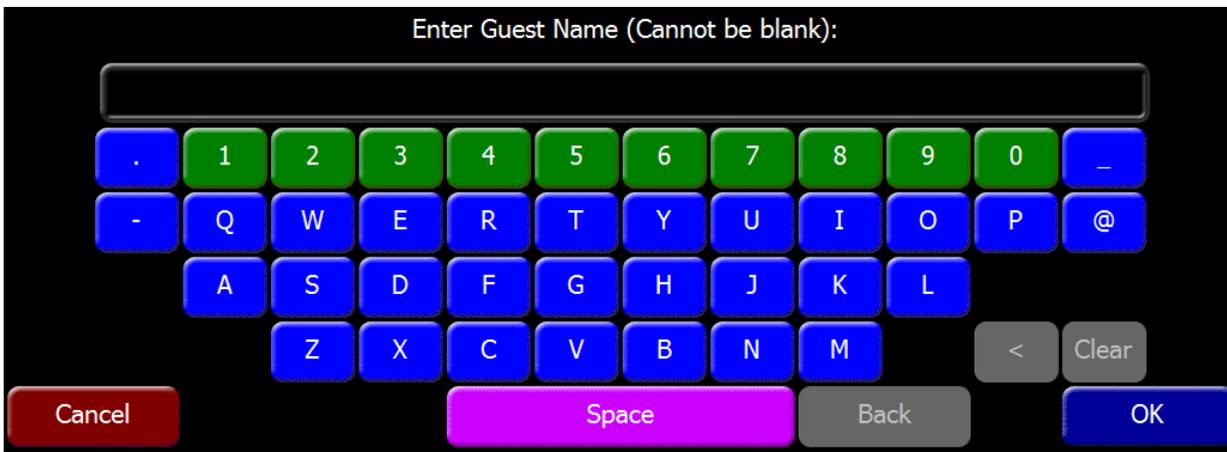
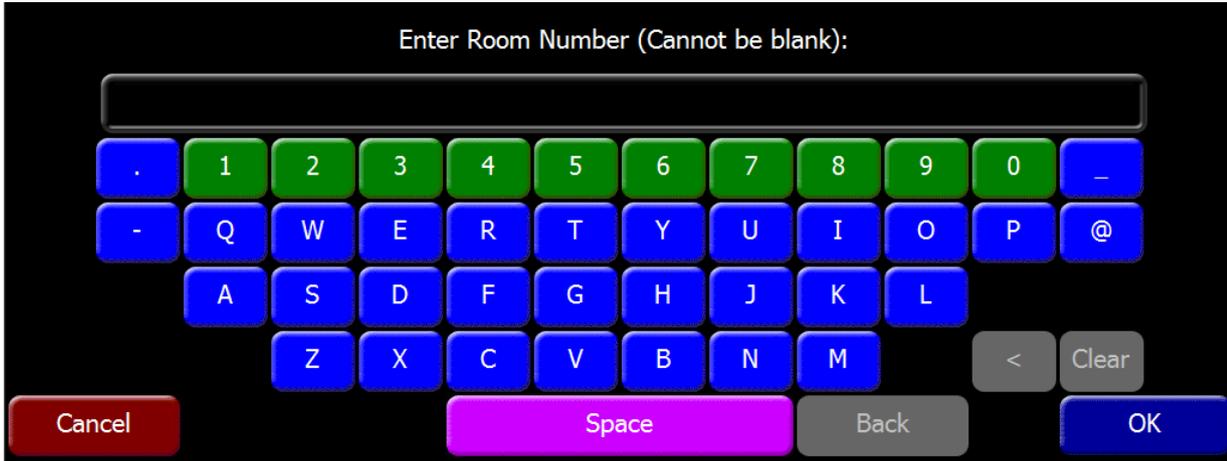


Selecting to enquire by guest name displays the guest name entry screen:



There is no length restriction on the number of characters which can be entered.

If the OK button is pressed before any characters have been entered the user sees a prompt that the field cannot be left blank:



When the enquiry is made (on room, guest or account), click **OK** to display the relevant information which includes Name, Room Number, and Credit Limit (where set in the PMS). If folio charges are not permitted, the text “No charges allowed” appears in the **Charge Allowed** column.

Name	Room	Credit Limit	Charge Allowed
Mr. J Appleton	802	£7924.20	-
MR J Appleton	802	£7924.20	-
MRS J Jennings	802	£7924.20	-
Mackie Research Capital Corporation		£0.00	-

At the bottom of the window, there are three buttons: **Ok** (highlighted in blue), **Prev**, and **Next**.

When a house account is returned, there will be no value in the **Room** column.

Click **OK** to return to normal POS operation.

Non-Room Postings

If enabled, the plugin attempts to post Non-Room Payments in the background. Non-room payments consist of all payments other than Room Payments, unless they have been configured to be excluded.

This allows the Hotel System to reconcile sales made through Aztec.

At a frequency configured in CLM settings in Base Data, the plugin queries the database for any payments made using a payment method other than room posting. Any transactions made since the last query made with a excluded payment type will be ignore.

These non-room payments are posted to the Infor system.

If the posting is accepted by Infor, a record is added to the 'HotelPosting' table stating the record has been posted.

If a 'no response' was received by Infor within the accepted window, a record is added to 'HotelPosting' stating the record is awaiting a retry. Five retries will take place.

If there is an issue with the generation of the message, the retries have failed, or Infor rejects the request, the record is stored in C:\ProgramData\Zonal\CLM\HotelPostingFailures\HotelPostingFailures.txt. Records stored in the file are marked as failures. **These records will not be retried and have to be manually reconciled in the Infor PMS system.**

Troubleshooting

Infor PMS Becomes Unavailable

When Infor PMS is unavailable for any reason (after the room posting has started), the till user will see the following:

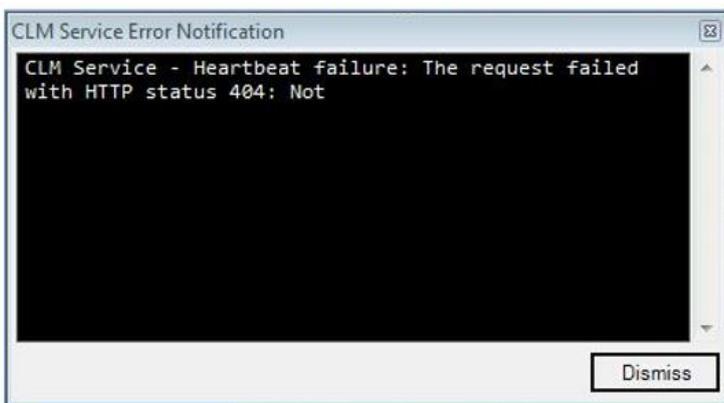


POS Integration Engine Unavailable

When POS Integration Engine is unavailable the till user will see the following when they attempt a room posting:



On the Aztec PC, an alert/notification is displayed if the POS Integration Engine becomes unavailable. The notification persists until dismissed by a BoH user.



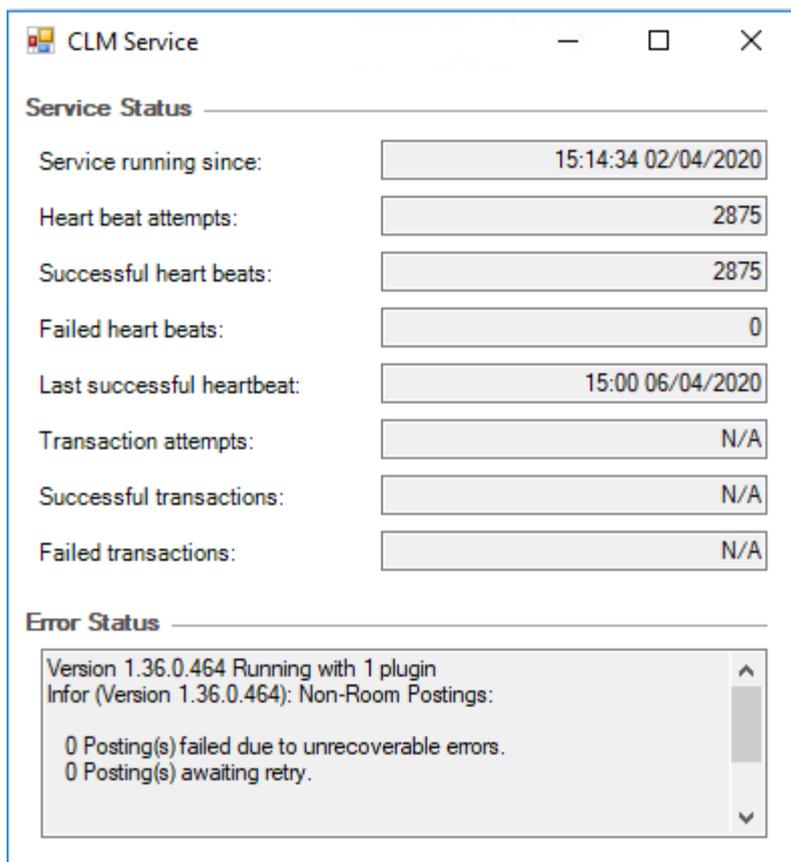
Service Monitoring

The service monitor has been configured to update one status of the Infor Plugin.

Under 'CLM Service' heartbeats will fetch the status of the Infor plugin and other plugins installed.

A message will be displayed in the Error Status with the current status such as:

```
Version XXXXXXXXX Running with XXXXXX plugin
Infor-PMS (Version XXXXXXXX): Non-Room Postings Status:
  2 Posting(s) failed due to unrecoverable errors.
  3 Posting(s) awaiting retry.
```



Logging

As with other iZone Plugins, the Infor Plugin logs to the 'Zonal.CLMEngine.WindowsService.exe' log file in the Aztec Log folder.

The log contains a record of all requests, transactions and errors performed through the Plugin. Logging performed by the plugin is prefixed with "Infor" and has 3 different levels: Debug, General and Error.

By default, General and Error logging is enabled, and Debug logging can be requested (enabled through a modification to the app.config).