

Zonal



RMS PMS **Site User Guide**

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Introduction

Document Scope

This guide is aimed at site staff and describes:

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

Overview

RMS PMS is a POS Integration Engine hotel plugin that integrates with Aztec to facilitate real-time room and non-room postings against an account in the RMS Cloud PMS.

Prerequisites

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

- Aztec 3.19.0 or later at head office and site
- POS Integration Engine v1.40.0 or later at site
- RMS PMS

Associated Documentation



RMS 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 *RMS PMS: Setup Guide*) will initiate a room posting.



The server is prompted to enter the amount to charge the room:

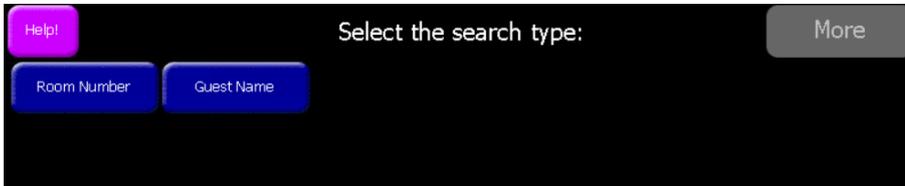


This defaults to the outstanding POS account balance, but another amount can be entered.

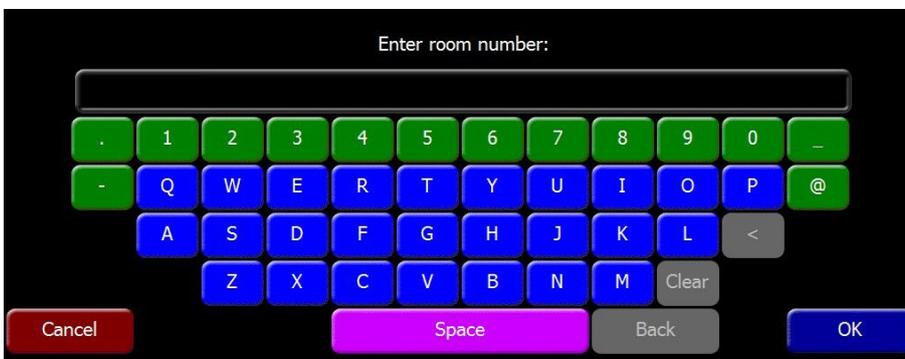
From this point onwards, steps can be slightly different depending on the Overpayment configuration (configured in *RMS PMS: Setup Guide*). For this walkthrough we have set the Room Posting to assume overpayment is Tip.

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).

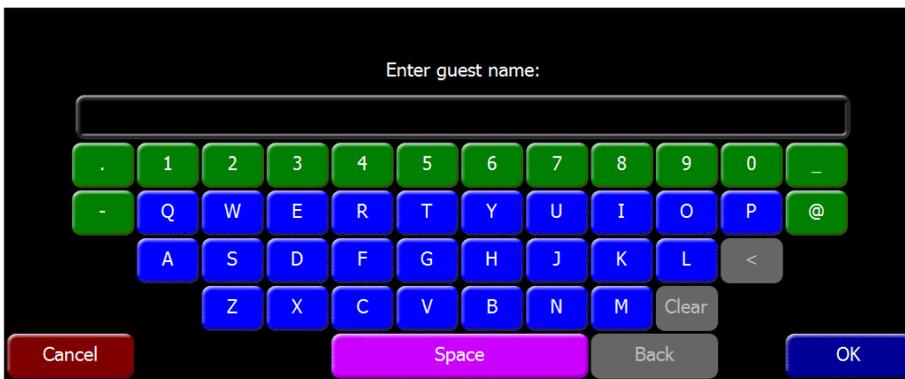
Once the amount is entered, the POS user will be prompted to search by room number or guest name:



Selecting to search by room number displays the room number entry screen. The room number entered must exactly match the room number on the RMS system, otherwise no accounts will be returned. Alphanumeric room numbers are supported:



Selecting to search by guest name displays the guest name entry screen. The name entered must exactly match the guest surname – partial search is not supported. The searches are **not** case sensitive and there is no length restriction on the number of characters which can be entered:



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

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

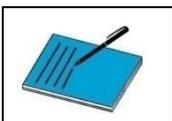


After OK is pressed, an enquiry is sent to the RMS system to get a selection of available room accounts.

- If a room number search was carried out, the available accounts will show all guests associated with the entered room number;
- If a name search was carried out, the available accounts will show all guests with an exact match to the entered surname

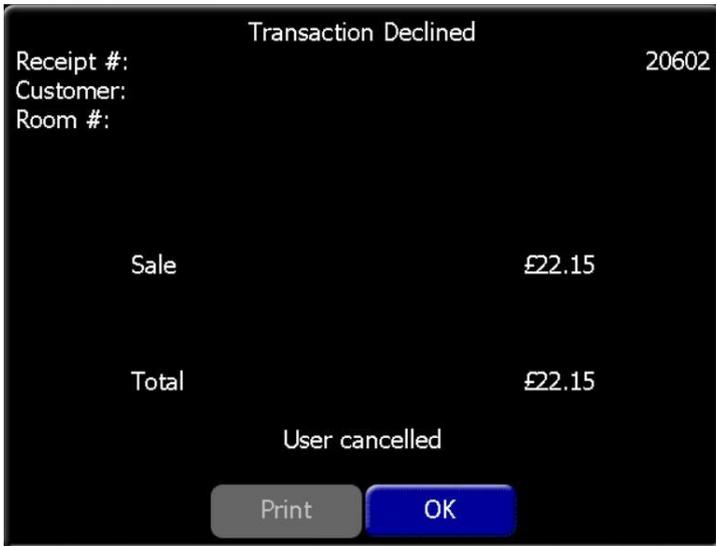


As can be seen in the above image, 2 available accounts have been returned by RMS. This screen can show a maximum of 16 accounts.



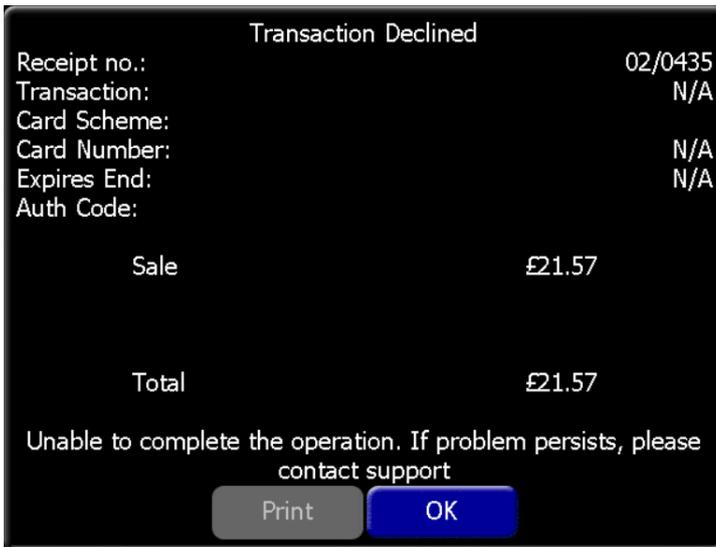
This is the last stage that the payment to room can be 'cancelled'. After this stage the payment will be taken from the POS account.

If cancel is pressed on this screen, a transaction declined screen is shown to the user and no payment is added to the POS account:



After selecting an account to charge, POS Integration Engine sends a request to RMS to charge the room with the amount that was entered.

If the request fails for any reason a Transaction Declined screen is shown to the user and no payment is added to the PoS account.



If the request was successful, a receipt will be printed for the guest to sign.

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

```
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: .....

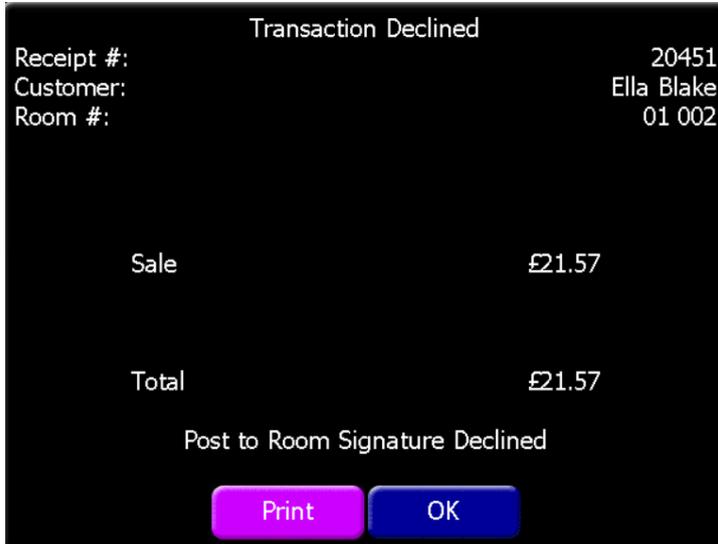
Room No:           802!
Name:              MR J Appleton
Signature:         .....
Please debit my room account
with the above total room charge
HOTEL COPY! U1 SETLP 0 2
```

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

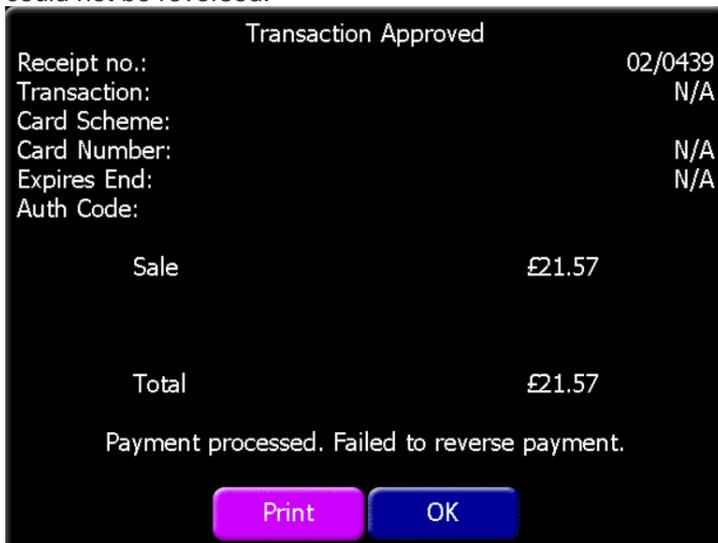


If the server rejects the signature, the system will attempt to reverse the payment to return the account back to its initial state.

- If the void request is successful, a Transaction Declined screen is shown to the user and no payment is added to the POS account:



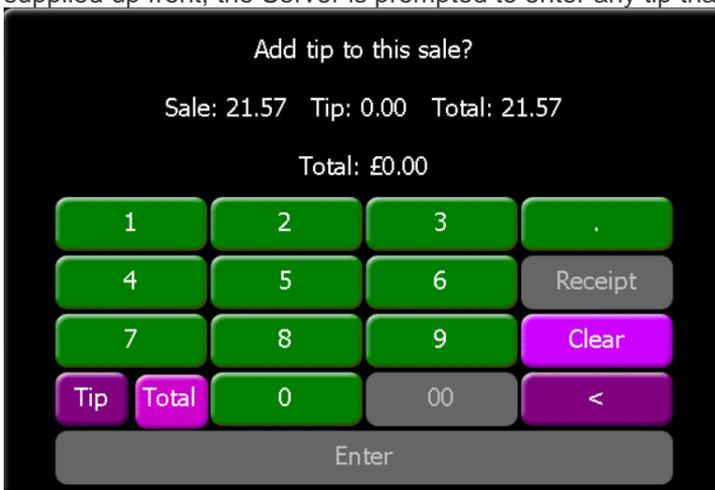
- If the void request is not successful, the payment is added to the POS account because the charge has been sent to RMS. A Transaction Approved screen is shown with a message explaining that the payment could not be reversed:



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



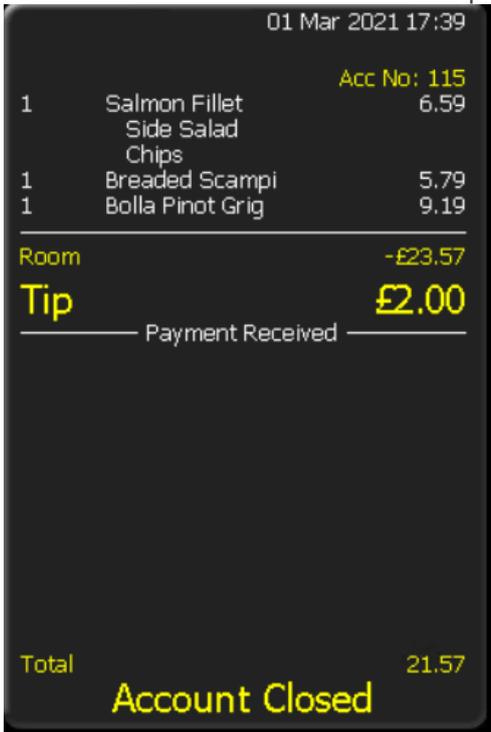
After the transaction shows as 'Approved', if the payment method is configured to handle tips and no Tip was supplied up front, the Server is prompted to enter any tip that was added by the customer on the signature slip.



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 (£2 in the example image below).

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

If successful, no further prompts are displayed and the server is returned to the POS 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

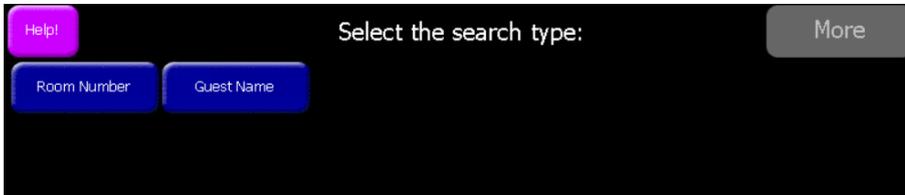
If the payment method is configured to not allow overpayment, the POS terminal does not accept an amount entered that is greater than the value of the account.

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

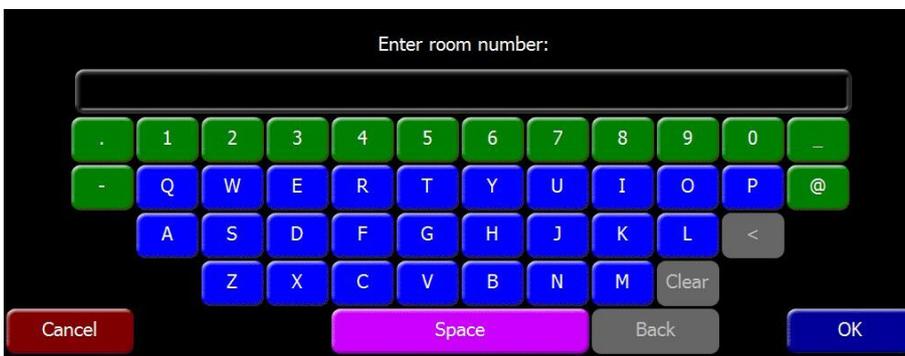
Making a room enquiry

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

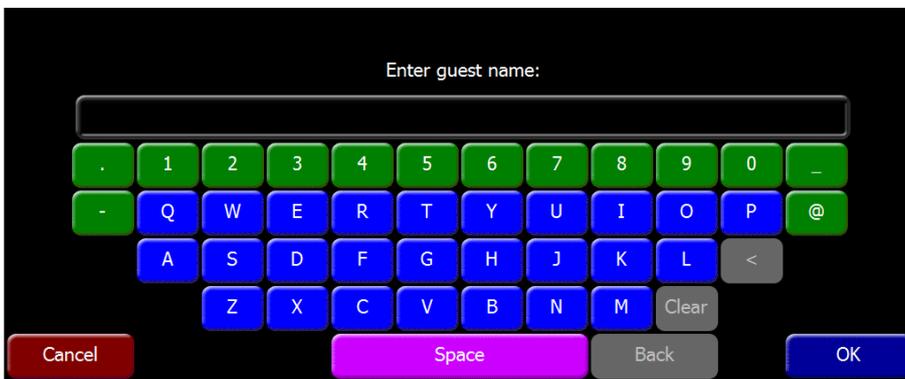
Pressing the Room Enquiry button on the POS will initiate a room enquiry and the POS user will be prompted to enquire by room number or guest name.



Selecting to search by room number displays the room number entry screen. The room number entered must exactly match the room number on the RMS system, otherwise no accounts will be returned:



Selecting to search by guest name displays the guest name entry screen. The name entered must exactly match the guest surname – partial search is not supported. The searches are **not** case sensitive and 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 number or guest name), click **OK** to display the relevant information which includes Name and Room Number. The Credit Limit and Charge Allowed columns will always be blank because RMS does not provide this information.

Name	Room	Credit Limit	Charge Allowed
Mary-Anne Fleming	01 073		-

Buttons: Ok, Prev, Next

If more results are returned than can be displayed then the Prev and Next paging buttons will be enabled. This allows the user to page through the results.

If no reservations were returned by RMS, indicating there are no in-house reservations in the given room or with the given surname, the above screen will still be displayed but will have no guests.

If an error occurs, for example the RMS system can't be reached, a Transaction Declined dialog will be presented with an appropriate message.



Click **OK** from the summary screen 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 an excluded payment type will be ignored.

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

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

If no response was received by RMS 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 RMS 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 RMS PMS system.**

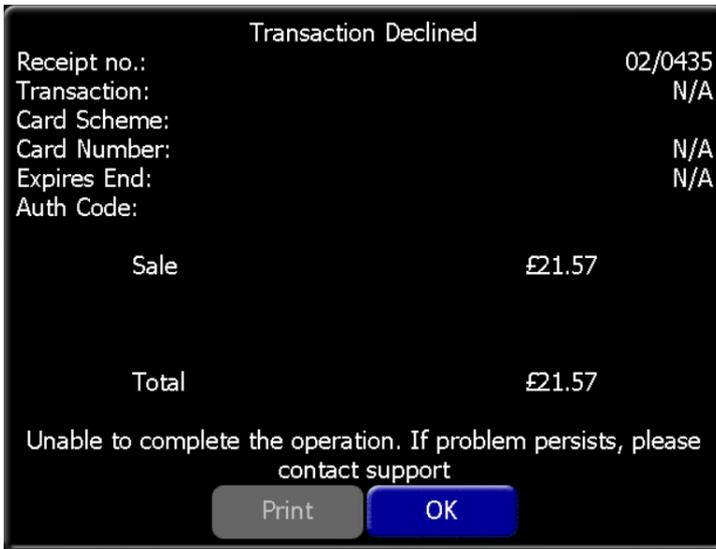
Reporting of Non-Room Posting Failures

The number of non-room postings that failed and are awaiting retry, and the number that have failed completely, are reported in the Aztec Service Monitor on the Site PC. Right-click the icon and navigate to **CLM Service > Status**.

Troubleshooting

RMS PMS Becomes Unavailable

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

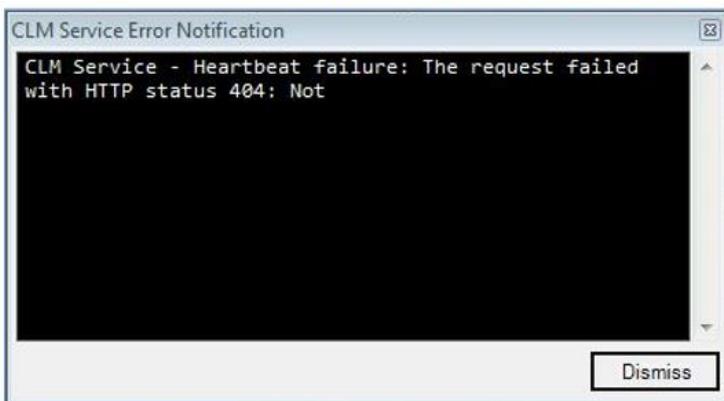


POS Integration Engine Unavailable

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.



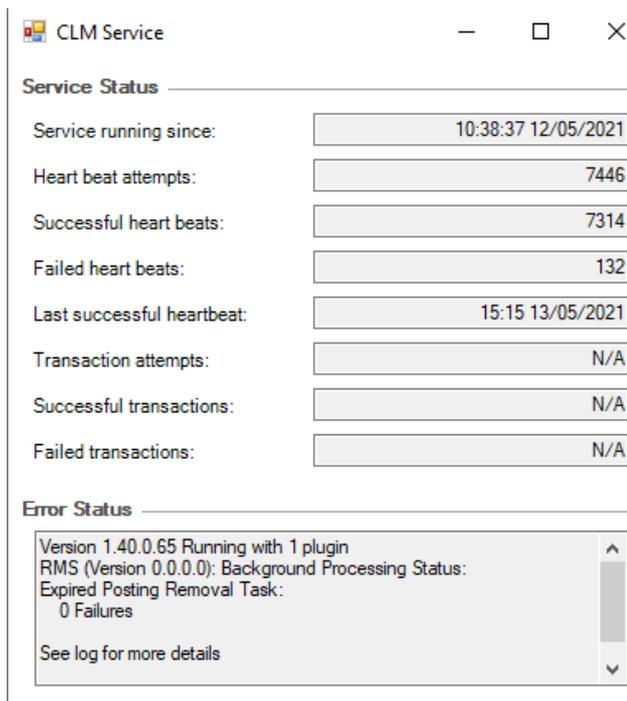
Service Monitoring

The service monitor has been configured to display the status of the RMS Plugin.

Under 'CLM Service' heartbeats will fetch the status of the RMS 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
RMS-PMS (Version XXXXXXXX): Non-Room Postings Status:
  2 Posting(s) failed due to unrecoverable errors.
  3 Posting(s) awaiting retry.
```



Logging

As with other POS Integration Engine Plugins, the RMS 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 "RMS" 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).