

1. Shift Instructions:

- a. Upon Arrival: Print Arrival and Departure Lists; Room Inventory; Housekeeping Report
- b. Before Departure: Print Cashier Report (Found in the Front Desk Operations Menu). Balance and verify transactions.
- c. As Needed: Print Arrival and Departure Lists; Guest In House; Charge/Payment Journals

2. Check-in Procedures

- a. Select Room View > Display Room Rack. Find an available room. You can right-click the room to view notes/descriptions. Left-click the room to select that room to check the guest into. You'll be prompted, "does this guest have a reservation". Select: No, guest is a walk-in. If the guest has a reservation, then select that guest.
- b. The first thing you'll see is the profile selection screen. For walk-ins, enter the guest name. If you see the guest listed, select the guest. If not, create a new profile for the guest. When you save the profile, the check-in screen (folio information) will open. If the guest has a reservation, the profile will display.
- c. For walk-ins, enter the number of nights, or the guests' departure date, or click the calendar to select a departure date. For reservations, verify the departure date.
- d. The room you selected should already be in the room number field. Enter the number of adults and children. Rate code 2 is correct. Don't change it. If you need to change the room rate, do so in the grid that opens when you get to the Room Rate field.
- e. Select the proper payment type. Your screen will display the total expected room and tax charges less any advance deposits.
 - i. If you are PREAUTHORIZING a credit card, select the card and answer Yes to the prompt to process the card. Continue following the prompts. The amount to preauthorize will be the credit limit for the guest. Shift4 will insert the approval code on the screen. **DO NOT USE A DIFFERENT CREDIT CARD AT ANY TIME UNLESS YOU FIRST VOID THIS PREAUTHORIZATION.**
 - ii. If you will CHARGE the card instead of preauthorizing it, answer NO to the prompt to process the card.
- f. When you get to the "split folio" field, answer Yes if you need two folios for this guest. One folio will contain the room and tax charges, which post automatically. The other folio is for incidentals such as restaurant charges. You may preauthorize a credit card, as described above (see 2.e.i.). It may be a different card than the one used for the primary folio.
- g. Continue the check-in and save it. If the guest is paying by cash or if the credit card payment will be made at this time, then post the payment now.
- h. Have the guest sign the registration form. Keep it.

3. Posting charges or payments

- a. Go to Post Folio. Enter the room number, or look up the guest by name. When the Post window opens, type the charge or payment to post or click it from the grid. Charges are aqua and payments are yellow.
- b. Charges are a DEBIT. They increase the guest's balance. Payments are a CREDIT. They decrease the guest's balance. A credit balance will have a minus sign. Posted credits will have a minus sign. You don't need to add the minus sign.

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- c. Enter through the fields until you get to the OK prompt. Press Enter there, ONLY ONCE. Your cursor will return to the Code field. You can enter additional transactions or press <Esc> if you're finished. If you're processing a credit card, there will be a slight delay after you press Enter at OK while the system calls Shift4. This is normal.
 - d. Never void, transfer, or adjust an advance deposit. The proper procedure is to do a new transaction, such as a credit.
 - e. Instructions on voids and adjustments can be found in the [Hotel User Guide](#). We strongly advise you to practice adjustments in a master folio for training until you understand how to do them properly. To adjust a charge, you'll enter a minus sign. To adjust a payment, do not put a minus sign.
4. Changing guest information, room, rate, etc.
 - a. Go to Display Folio. Enter the guest's room number. When the folio opens, click "Change folio". The main folio will open. This is the same screen you saw at check-in. Make the changes and then save the folio.
5. Check-out Procedures
 - a. If a credit card was preauthorized: Go to check out. Enter the room number. You'll be notified that the balance is not zero and you will be taken to the Post screen. IMPORTANT: DO NOT type anything in the Code field or anywhere else. Simply press <enter>. The card on file will be processed for the balance due. To make a partial payment on the preauthorized card, process it the same way except that you'll enter the amount to pay on this credit card. Then, after that card has been processed, your cursor will return to the Code field. At that time, select the next payment method. You MUST process the preauthorized card first. If the guest wants to use a different card altogether, you must select "void preauthorization" to void the card on file. Then select the payment method and enter the amount.
6. Guest History (Front Desk Operations Menu)
 - a. Display or print a folio
 - b. Use the Report Generator
 - c. To change Profile Information (such as email address or a comment) go to People/Profile.
7. Housekeeping:
 - a. From the Front Desk menu you can print the housekeeping report.
 - b. From Front Desk Operations or from your Housekeeping icon, you can change a room's status.
 - i. **Dirty**
 - ii. **Clean**
 - iii. **Needs Inspection**
 - iv. **Out of Order**. When you set a room to Out of Order, you'll be prompted to enter the out of order dates as well as a comment such as "repair A/C" or "remodelling". To remove a room from out of order, first remove the out of order dates, and then change the status to Dirty or Needs Inspection. Only vacant rooms can be set to Our of Order.
8. When you leave your workstation, log out: File > Exit Execu/Tech.

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