



# OPERA PMS (ORACLE) PROPERTY MANAGEMENT

**Manual de trabajo para soporte y desarrollo**

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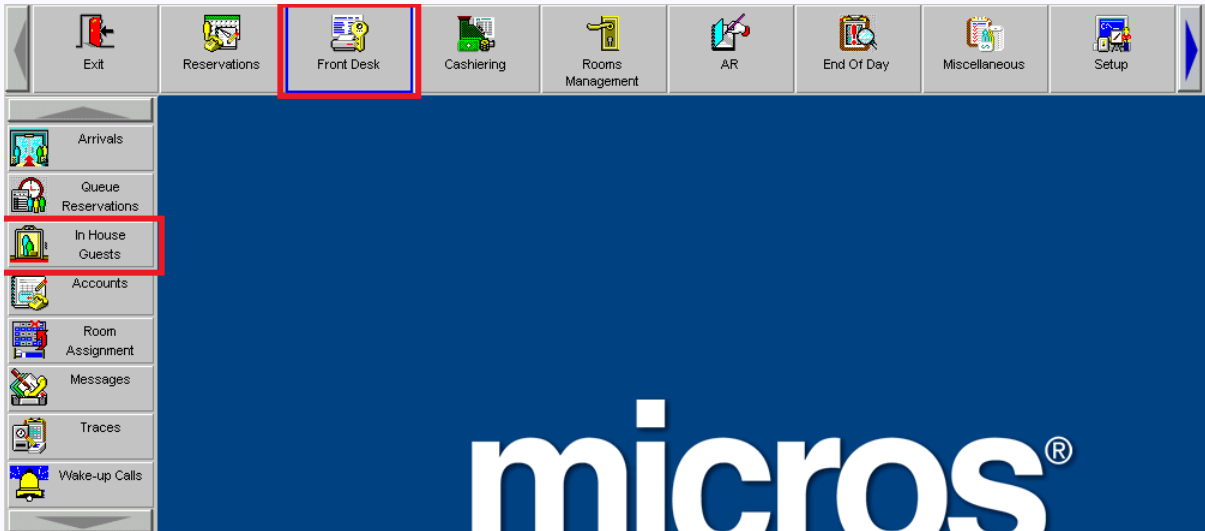
In this daily work manual you will find operations necessary for the support of Oracle's Opera PMS software, also in this manual pod You will find the description of the processes and procedures (SQL scripts) for the development of new work reports and an introduction to the development of Java JEE Web applications with AWS Amazon for the creation of Web Online reports that will allow you to view Opera data in real time through consultation web reports for SmartPhones, Tablets or PC.

[Purchase the complete Manual for \\$ 20.00.](#)

## Issuance of vouchers, Invoices and Tickets from Opera PMS

In order to issue a Ballot, we must verify that the client has the field "Tax Type "as TICKET in the Client's profile.

enter the menu "Front Desk" option "In House Guests" to list all customers who are staying at the Hotel.



On the "In House Guest" screen, select the client for whom you want to verify the Tax Type of their profile and select the radio button "Profile".

Room No. <input type="text"/>	First Name <input type="text"/>	CRS No. <input type="text"/>	
Name <input type="text"/>	Corp. No. <input type="text"/>	Conf. No. <input type="text"/>	
Company <input type="text"/>	Block <input type="text"/>	Mem. Type / No. <input type="text"/>	
Group <input type="text"/>	Arrival From <input type="text"/>	Arrival To <input type="text"/>	
Source <input type="text"/>	IATA No. <input type="text"/>	Party <input type="text"/>	
Agent <input type="text"/>	Postal Code <input type="text"/>	Communication <input type="text"/>	
Contact <input type="text"/>			

* Name	Room	Room Type	Arrival	Departure	Rms	Prs	Status	Mem. Level
B... ..	9119	PM	06-03-19	15-03-19	1	0/0	CHECKED IN	
* Child, Tzi F	0220	SK	06-03-19	13-03-19	1	1/0	CHECKED IN	
COMPANIA PERUANA DE	9140	PM	06-03-19	15-03-19	1	0/0	CHECKED IN	
G... ..	9016	PM	06-03-19	16-03-19	1	0/0	CHECKED IN	
GPO NESTLE PERU	9004	PM	06-03-19	15-03-19	1	0/0	CHECKED IN	
GRUP... ..	9000	PM	06-03-19	18-03-19	1	0/0	CHECKED IN	
Jimenez Zuna, Paul	9010	PM	06-03-19	16-03-19	1	0/0	CHECKED IN	
L... ..	0832	SK	06-03-19	13-03-19	1	1/0	CHECKED IN	
M... ..	0604	SK	06-03-19	15-03-19	1	1/0	CHECKED IN	
MEGASHOW S.A.	9104	PM	06-03-19	15-03-19	1	0/0	CHECKED IN	
P... ..	9102	PM	06-03-19	15-03-19	1	0/0	CHECKED IN	
BNI PERU SAC	9121	PM	07-03-19	13-03-19	1	0/0	CHECKED IN	

Routing
Traces
Profile Notes

The "Individual Profile" screen shows the most important customer data. on this screen select the option button "More Fields".

The screenshot shows the 'Individual' profile screen in Oracle Opera PMS. The 'More Fields' tab is selected and highlighted with a red box. The form contains several sections:
 

- Address Information:** Last Name (G...), First/Middle (H...), Language/Title (S...), Address (GUATEMALA), City, Postal Cd./Ext., Country/State (GT).
- Internal Information:** Salutation (Estimada señora), Date of Birth (XXXXXX), VIP (VIP2), ID Type (PASSPORT), ID Number (XXXXXXXX97), ID Country (GT), Ref. Curr. (USD), Bus. Seg., Mail Action, Mailing List, Keyword, email FA (hei@gmail.com), Active (checked), Contact (unchecked), History (unchecked).
- Communications:** EMAIL (hei@gmail.com).
- Attributes:** Rate Code, Member No., Member Level, AVR No., Last Room (1418), Last Rate (115.00), Last Visit (06-03-19).
- History Information:** (Empty fields).

 The 'OK' button is highlighted with a yellow box. At the bottom, there are buttons for 'Attachments', 'Comm.', and 'Notes'.

On the “More Fields” screen make sure the Tax Type field is marked with the TICKET option and select the OK option button.

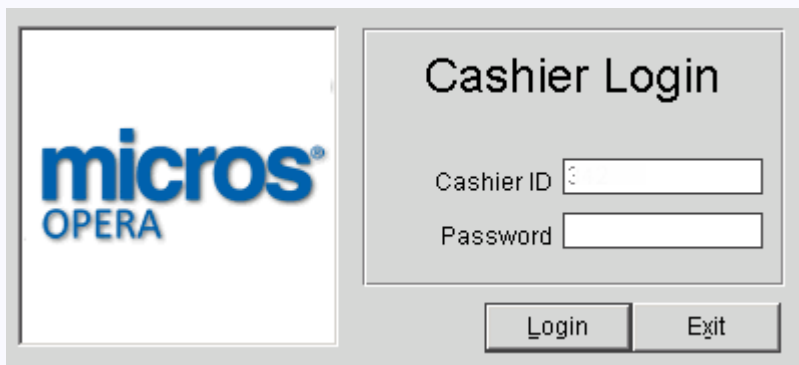
The screenshot shows the 'More Fields' dialog box. The 'Tax Type' dropdown menu is highlighted with a red box and set to 'BOLETA'. The 'R.U.C.' field is empty. The 'OK' and 'Close' buttons are visible at the bottom.

Upon returning to the “Individual Profile” screen, select the “Save” option button to save the changes made, then click on the Ok and Close button.

With this we make sure that the client has the Tax Type as TICKET, which will allow us to generate the receipt of payment type Ticket.

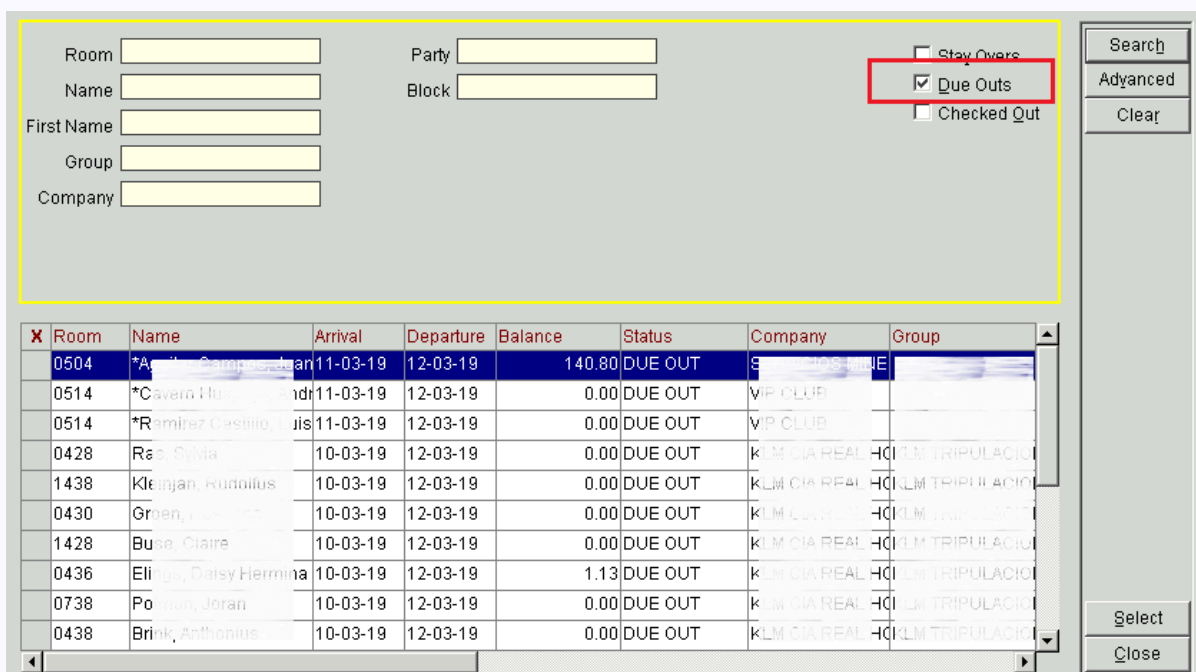
Enter the menu "Cashiering" option "Billing" to show the clients that are hosted for which it is possible to generate a proof of payment for any concept of stay, consumption or services.

Previously, the Login screen will be shown to request the ATM access credentials.



On the In “House Guest Search” screen, filter the “Due Outs” records, which are the records of clients pending departure, clients who are staying and consume the services that the Hotel offers to which a payment receipt must be generated. , in this case a Ballot.

Select the "Due Outs" option and click on the "Search" option button.



On the "House Guest Search" screen, select the customer record for which you want to generate the payment slip and then click on the "Select" button. ", The " Billing "screen will be displayed.

X Room	Name	Arrival	Departure	Balance	Status	Company	Group
0504	*A...	11-03-19	12-03-19	140.80	DUE OUT	S...	
0514	*C...	11-03-19	12-03-19	0.00	DUE OUT	V...	
0514	*Ramirez C...	11-03-19	12-03-19	0.00	DUE OUT	V...	
0428	Ros, Sylvia	10-03-19	12-03-19	0.00	DUE OUT	KLM CIA REAL H...	CKLM TRIPULAC OI
1438	Keinjan, Rudolfus	10-03-19	12-03-19	0.00	DUE OUT	KLM CIA REAL H...	CKLM TRIPULAC OI
0430	Gleen, Rosanne	10-03-19	12-03-19	0.00	DUE OUT	KLM CIA REAL H...	CKLM TRIPULAC OI
1428	Buse, ...	10-03-19	12-03-19	0.00	DUE OUT	KLM CIA REAL H...	CKLM TRIPULAC OI
0436	Elinge, Daisy Herrera	10-03-19	12-03-19	1.13	DUE OUT	KLM CIA REAL H...	CKLM TRIPULAC OI
0738	Polman, Johan	10-03-19	12-03-19	0.00	DUE OUT	KLM CIA REAL H...	CKLM TRIPULAC OI
0438	Bink, Anthonius	10-03-19	12-03-19	0.00	DUE OUT	KLM CIA REAL H...	CKLM TRIPULAC OI

On the "Billing" screen, the customer's account details are displayed. It is important to indicate that on this screen you can have up to 8 Windows, windows that will allow us to classify the customer's accounts and generate receipts for each Window.

Note that Window (02) has an account of 140.80 USD that is not yet paid and that Window (03) has an account of 32.00 USD that is paid through the VISA payment method.

Select Windows (02) and click on the option button "Check Out", the "Payment" screen will be displayed.

(1) A	(2) S	(3) A	(4) A
0.00	140.80	0.00	0.00

X Date	Code	Description	Amount
11-03	1100	Alojamiento Paquete	110.00
11-03	8000	IGV 18%	19.80
11-03	8001	Servicio 10%	11.00

X Date	Code	Description	Amount
11-03	9010	Visa	-32.00
11-03	1080	Ajuste Alojamiento	25.00
11-03	8000	IGV 18%	4.50
11-03	8001	Servicio 10%	2.50

On the "Payment" screen, select the "Payment Code" option to "Cash Dollars", the Currency option to USD, in the Amount field indicate the amount 140.80 and in the Reference field indicate

a description of the account, then click on the option button Post with this the payment is loaded to the system and the account is closed.

Payment Code 9000 Cash Dolares  
Currency USD US Dollar  
Amount 140.80 USD  
Reference PRUEBA  
Print Folio  
Post Close

In the next screen PoPop indicate No, to send the receipt to the digital tax document issuer program in your Country (or Electronic Invoicing of the Central Tax Administration)

OPERA  
Would you like to print a receipt?  
Yes No  
Waiting for Response from Fiscal Program

This process of sending the voucher data to the central tax administration of your country, printing the voucher with the data of the voucher number, QR code.

At the end of the process, a record for -140.80 (negative) is shown in the account window, indicating the closure of the account.

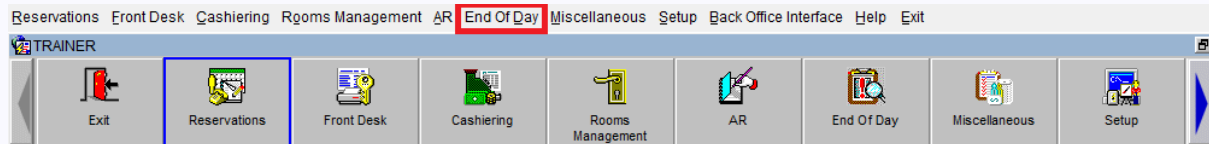
X	Date	Code	Description	Amount
	12-03	9000	Cash Dolares	-140.80
	12-03	8000	IGV 18%	19.80
	12-03	8001	Servicio 10%	11.00
	11-03	1100	Alojamiento Paquete	110.00

Closing of Day Process or Audit with Opera PMS

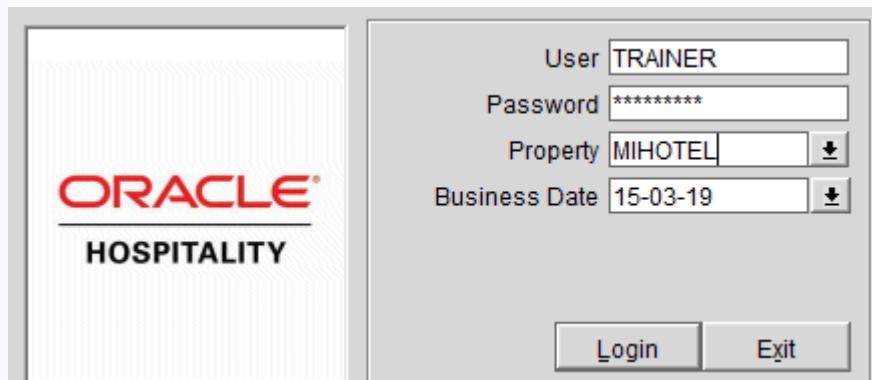


The closing of day allows updating the business date (Business Date) to the current operation date, in addition the closing process is very important for the generation of hotel management reports.

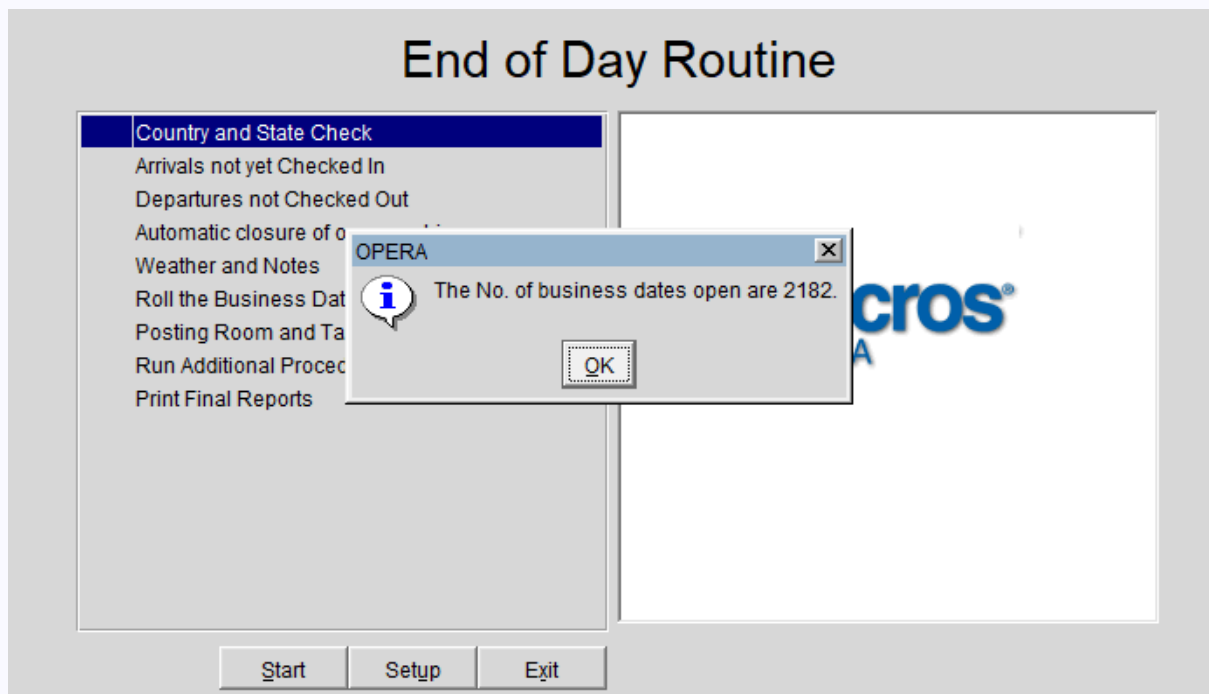
Enter the "End of Day" option menu and select the "Night Audit" menu.



The "End of Day Login" form will be displayed and select the "Business Date" that we wish to close.



The "End of Day Routine" screen will be displayed, which will validate the conclusion of the processes that allow the proper closing of the day.



Click the OK button and then click the Start button.

Opera shows you the pending arrivals or reservations for Check In not yet registered, which must be registered, this also alerts us about the status of pending arrivals.

Arrivals not yet Checked In - Confirmation No. 2875889

Name	First Name	CRS No
Company	Corp. No.	Conf/Cxl No.
Group	Block	Mem. Type / No.
Source	Arrival From: 14-03-19	Arrival To
Agent	IATA No.	Party
Contact	Postal Code	Communication
Custom Ref.		

Guests who have not arrived yet will be listed as NOSHOW.

* Name	Arrival	Departure	Status	Room	Room Type	Prs	Rms	Mem. Level
AL...	14-03-19	23-03-19	GPO CONFIR		SS	9/0	9	
ARMAS YAVA, LOURDES ADEL	14-03-19	24-03-19	GPO CONFIR		SS	1/0	9	
BARCAS, MARI CARMEN	14-03-19	24-03-19	GPO CONFIR		SS	10/0	7	
BARCAS, MARI CARMEN	14-03-19	17-03-19	GPO CONFIR		SS	3/0	3	
Berghuis, Marijn	14-03-19	16-03-19	6PM	1436	EK	1/0	1	
Besseling, Jolanda Johanna Ca	14-03-19	16-03-19	GPO CONFIR	0530	SK	1/0	1	
Blijleven, Eric Dytella	14-03-19	16-03-19	GPO CONFIR	0528	SK	1/0	1	
Borgstein, Albert Pieter	14-03-19	16-03-19	GPO CONFIR	1428	EK	1/0	1	
* Cerda Soto, Rene	14-03-19	17-03-19	GTD T CDTO	0420	ST	1/0	1	
* Cerdan, share	14-03-19	17-03-19	GTD T CDTO	0420	ST	1/0	1	
CLAUDIO TRUJILLO ROLF VLA	14-03-19	16-03-19	6PM		SK	2/0	1	
Costa de Sousa, Caio	14-03-19	15-03-19	GTD T CDTO	0408	ST	1/0	1	

No Post

To continue with the closing of the day, it is important to check in for all arrivals on the date that is closing in order to continue with the process.

After assigning the Room and the Rate, click on the Check In option button.

If the Check In is successful, the registration must leave the check-in pending list. Continue with this process until the check-in pending registration tray is left without records.

During the validation of the pending Check Out records, the "Guests At Home" screen is displayed, for which the corresponding Check Out must be generated before continuing with the closing process.

Room  Block   
 Name  Room Type   
 First Name  Custom Ref   
 Group  Pay. Type   
 Agent   
 Company

X	Room	Name	Arrival	Departure	Balance	Status	Custom Ref	Room Type
	9011	YIN HE YHP	09-03-19	14-03-19	159.51	DUE OUT		PM
	9012	AGRICOLA	11-03-19	14-03-19	896.00	DUE OUT		PM
	9105	VIVRA COMUNICAD	12-03-19	14-03-19	-725.00	DUE OUT		PM
	9124	REAL SYSTEMS S A	13-03-19	14-03-19	-2,534.33	DUE OUT		PM
	9108	MERCADO ESTO AD	14-03-19	14-03-19	0.00	DUE OUT		PM
	9143	BID	14-03-19	14-03-19	24,570.40	DUE OUT		PM
	9203	E. B. PAREJA LE	14-03-19	14-03-19	0.00	DUE OUT		PM

Before proceeding with the Checkouts, it is important to configure the printtasks necessary for printing the CheckOut.

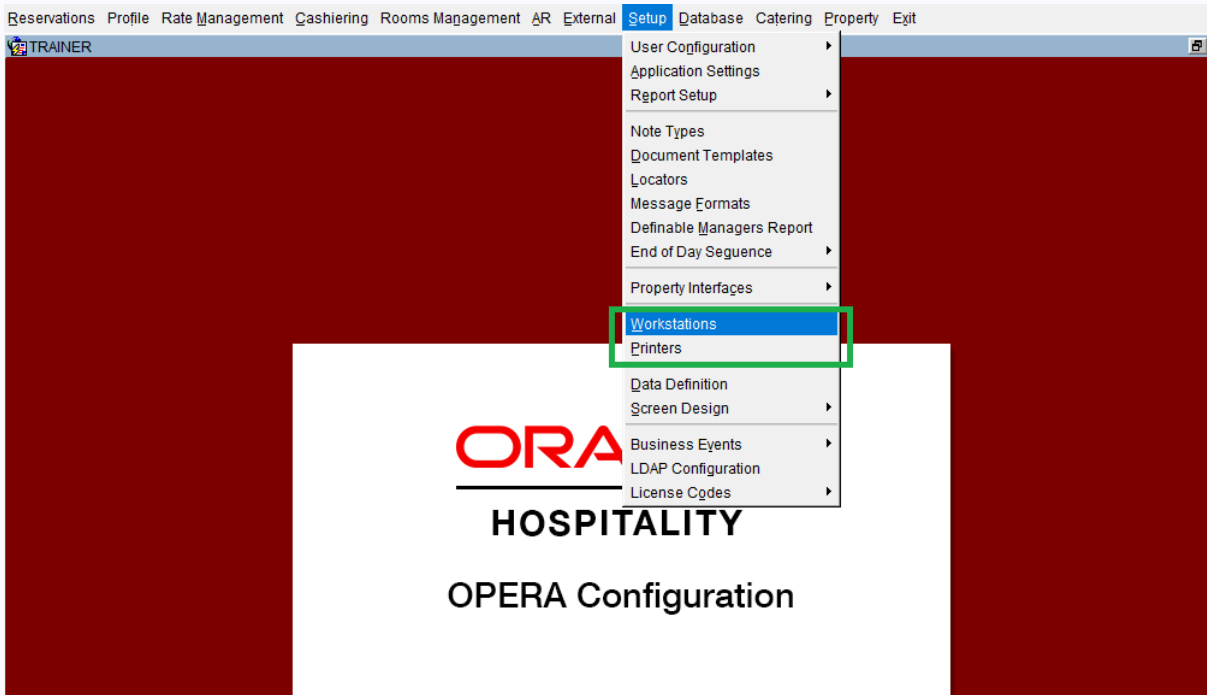
First Name   
 Group   
 Agent   
 Company

Payment Code  Cash Dolares  
 Currency  US Dollar  
 Amount  USD  
 Guest: YIN HE YHP190312

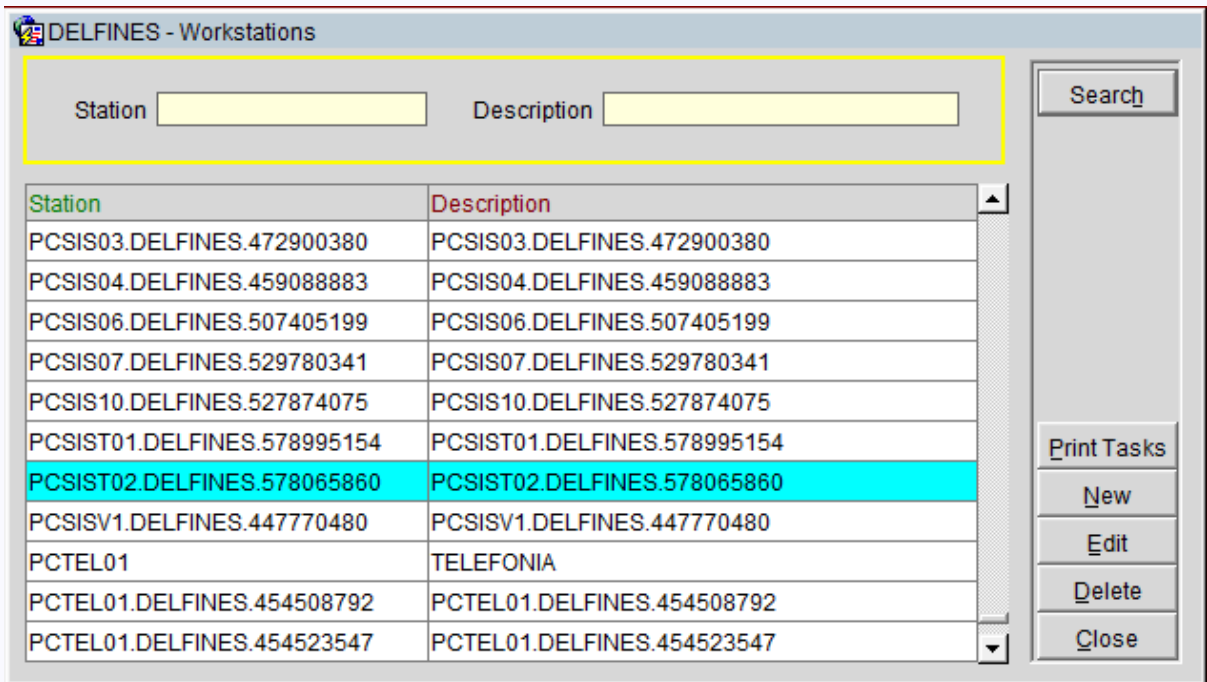
OPERA  
 Please setup GST FOLIO printer task for PCSIST02. DELFINES.578065860 terminal.

Print Folio

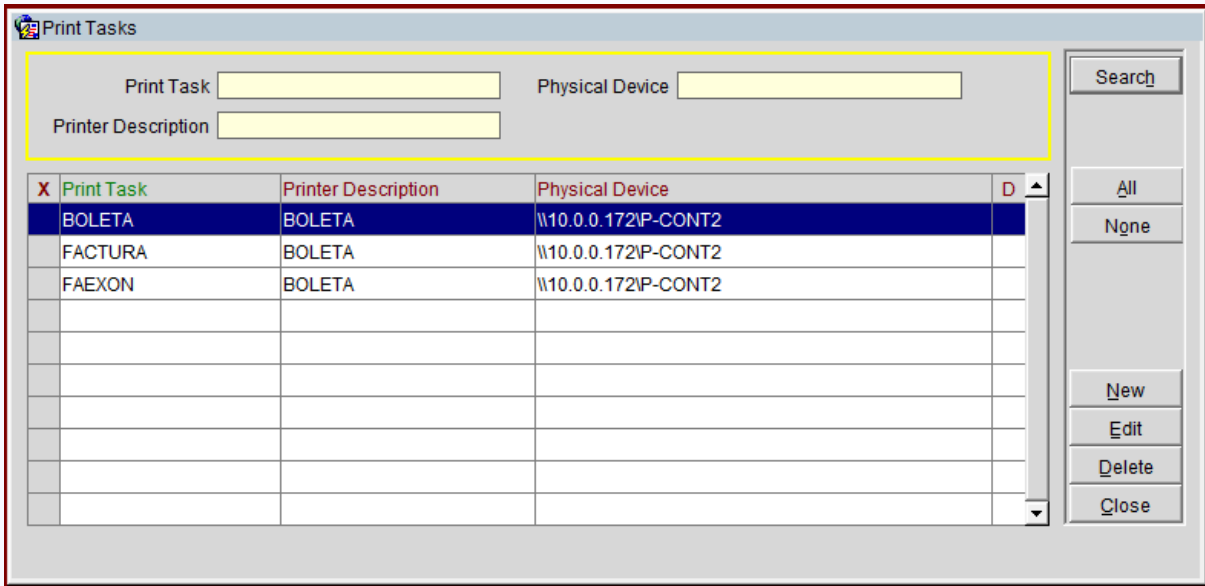
Log in with the supervisor role, select the Configuration option, in the Configuration screen, select the Workstation menu option.



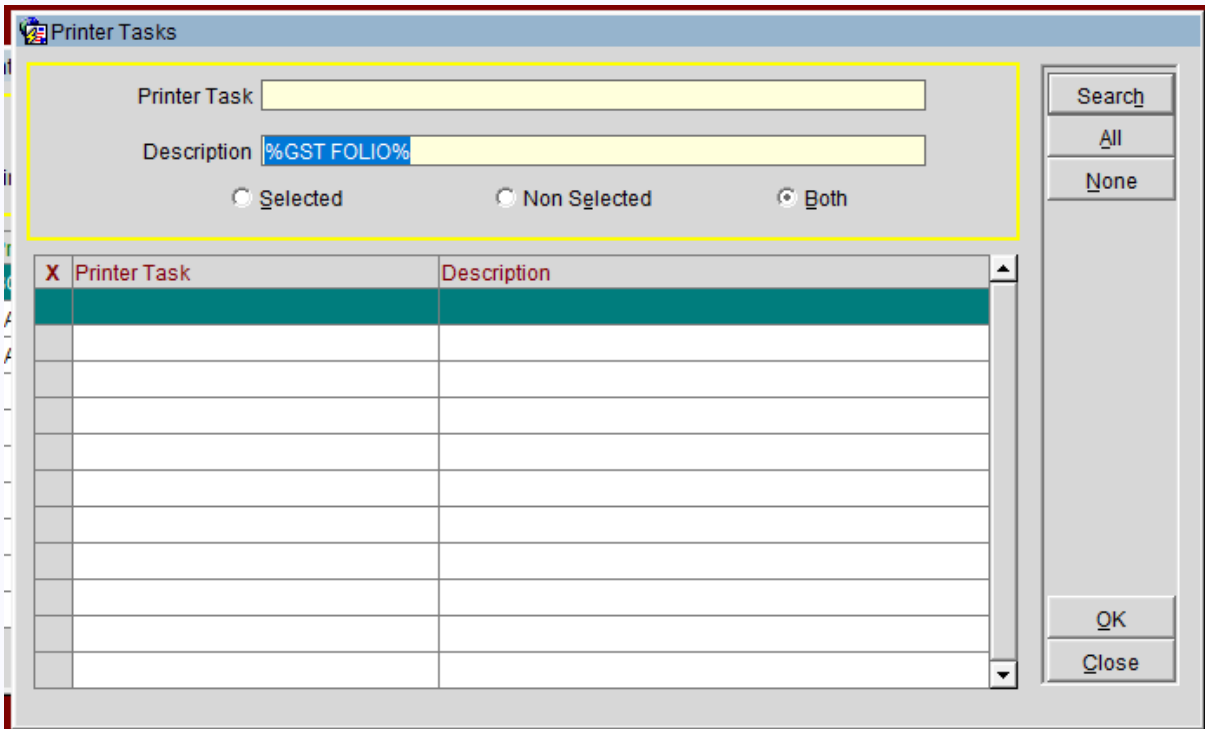
Select the WorkStations corresponding to the current work pc, which is usually highlighted in blue.



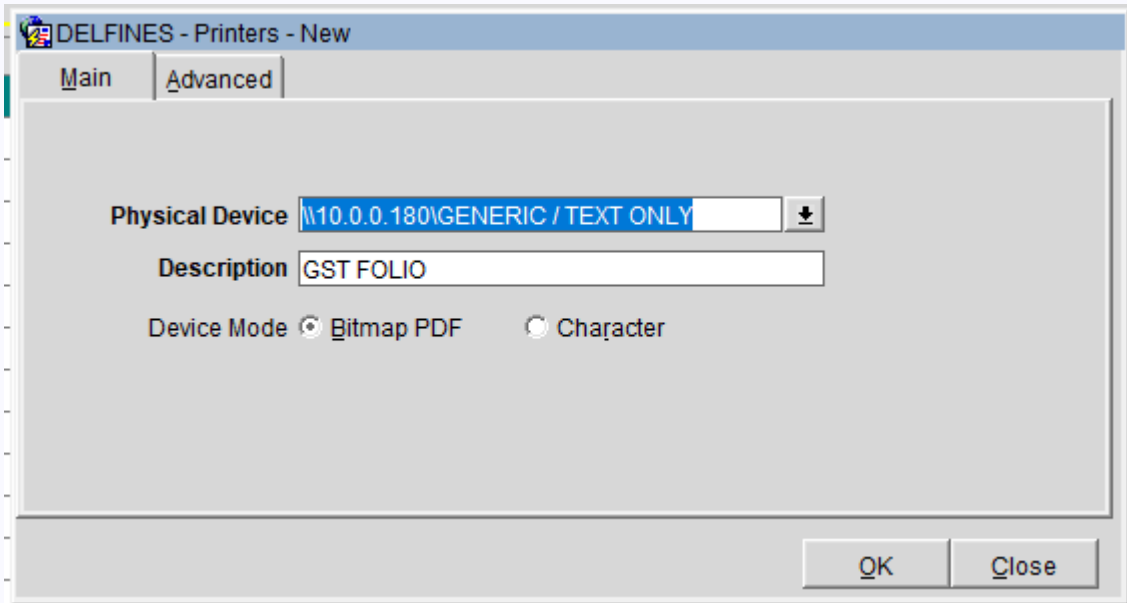
Click on the Print Tasks option button to display the Print Task screen.



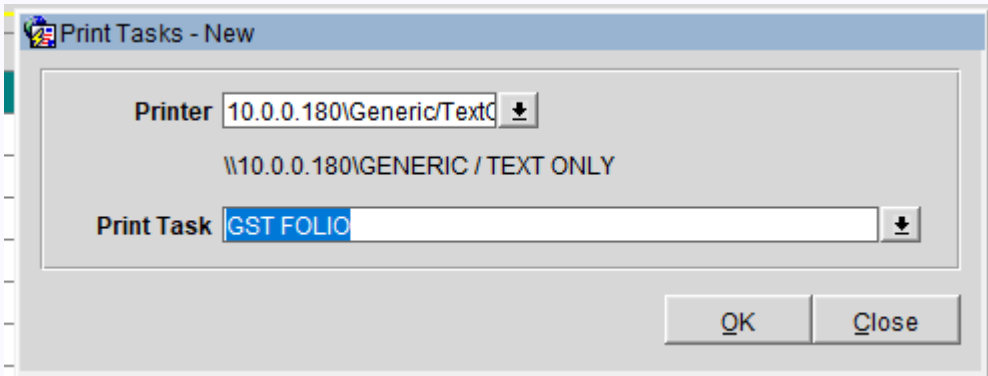
Within this screen, click the New button.



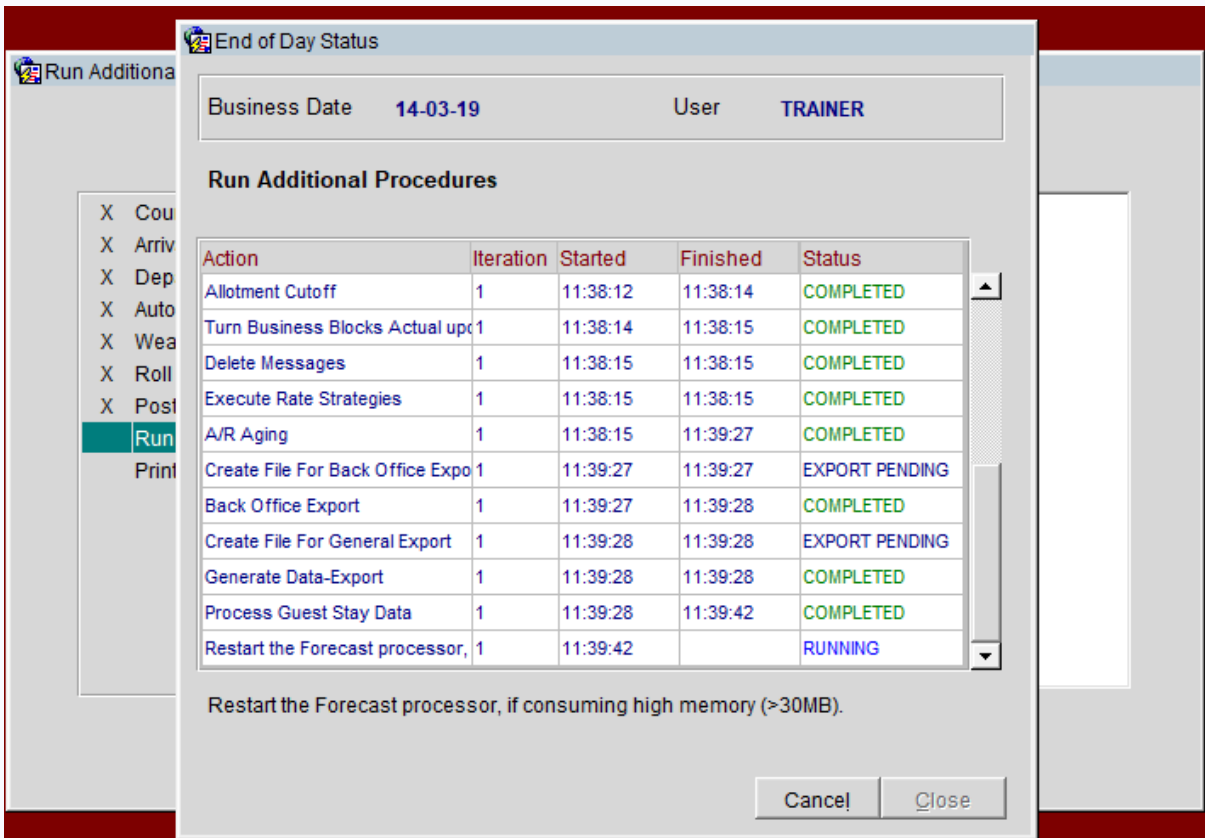
If the Printer Task is not displayed on the screen, it must be registered on the Printers screen, select the option menu Printers, the screen will be displayed, and click on New



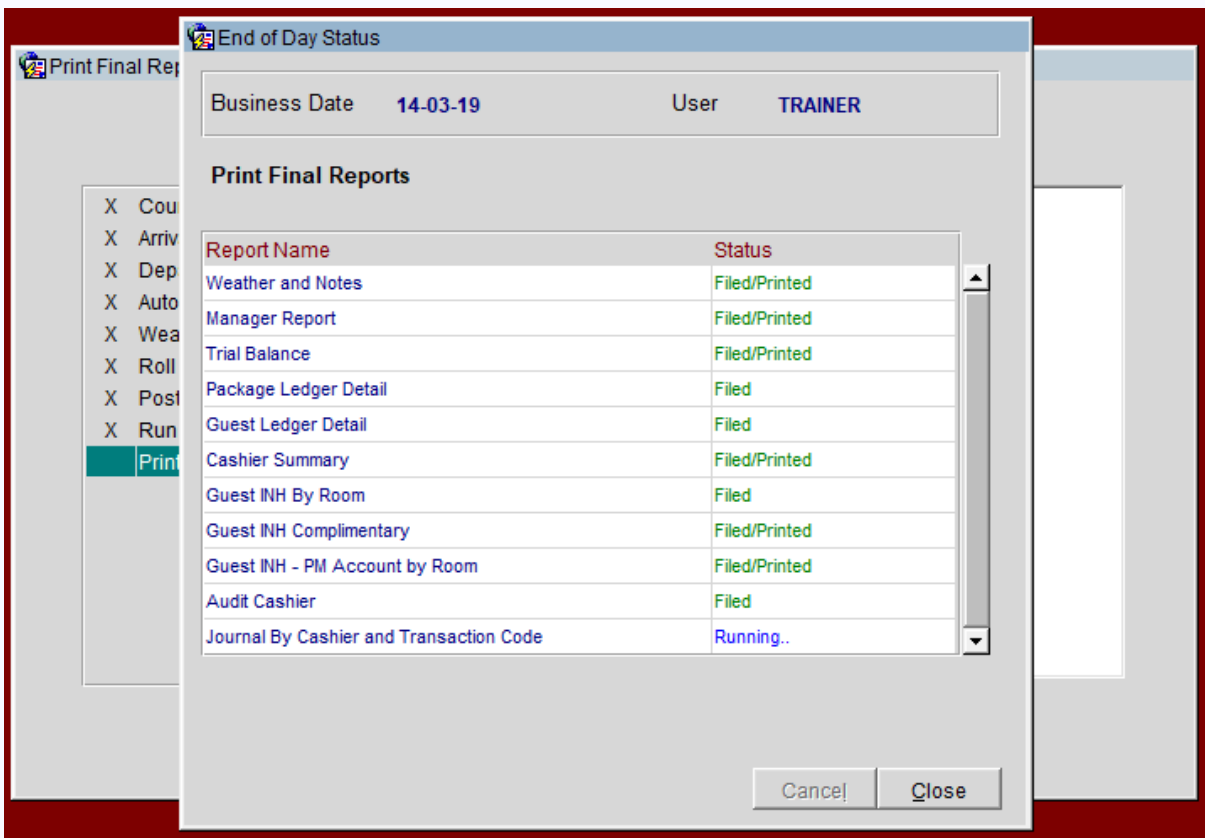
Create the required print task, then in the WorkStation add the necessary PrintTask.



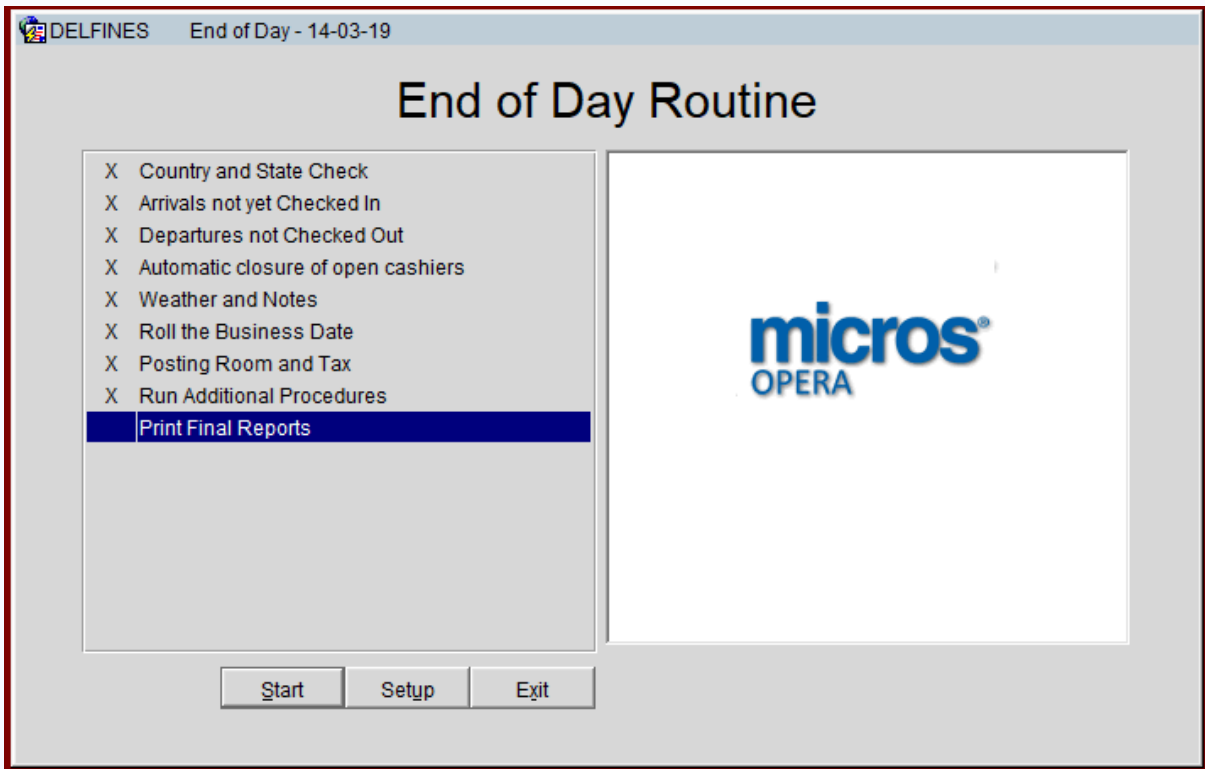
Opera will begin to close the day and complete all pending operations for a proper closing.



The closing process also prints the pending reports of the day's operations.



At the end of the closing process for the day, the printing of the final report is requested.





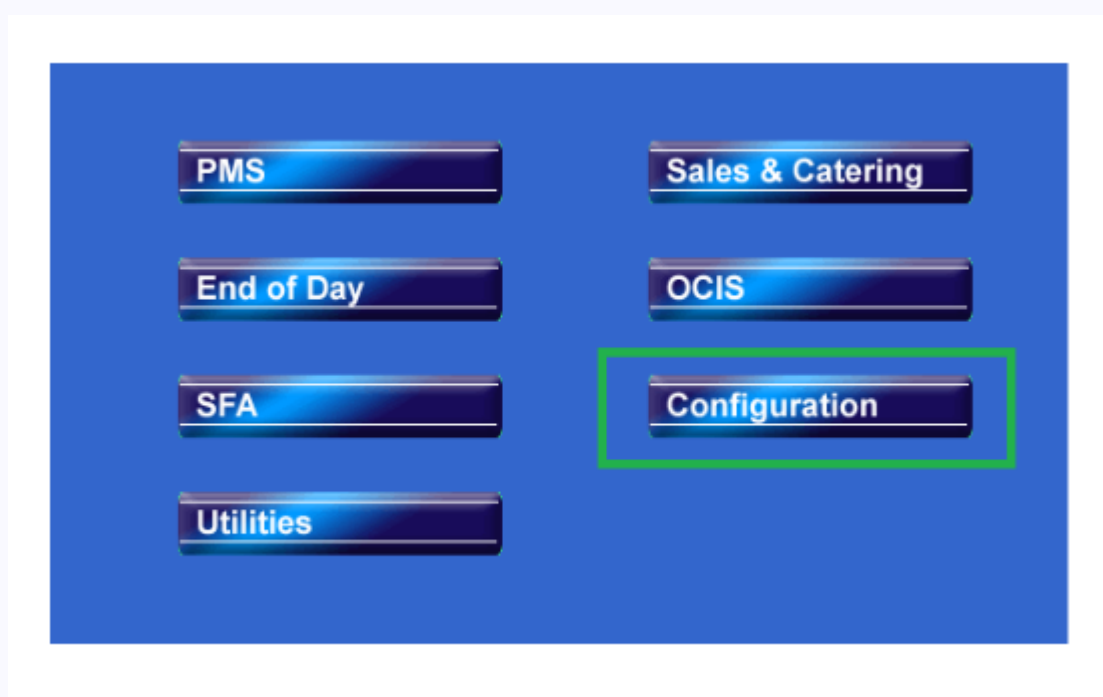
## Configuration of Rate Strategy in Opera PMS

The rate strategy allows us to control the price restrictions (discounts and surcharges) that we wish to apply to room reservations according to the occupancy or availability of the hotel rooms.

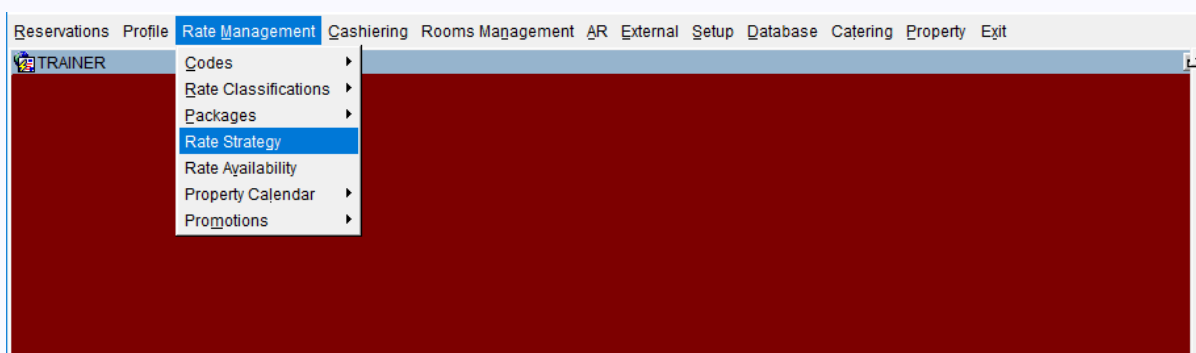
For example, if the rooms of a certain category are sold with a discount until they exceed 10% of occupancy, once this percentage of occupancy is exceeded, the discount is withdrawn and the remaining 90% is sold without any discount.

We want this restriction to apply for check-ins from 05/01/2019 to 05/31/2019, we want to control the restrictions during the month of March and the month of April, that is, from 03/01/2019 to 04/30/2019.

In Opera we enter the configuration module.



Then we select the Rate Strategy option.



On the Rate Strategy screen we will define the rate strategy according to the established conditions.

You should always define two strategy registers the rate strategy and its counterpart. In other words, rates are defined for reservations greater than 10% occupancy and the registration of rate strategies for reservations less than 10% occupancy.

Rate strategy for a specific pricing code called CRESP.

The screenshot shows the 'Rate Code' configuration window. The 'Rate Code' field contains 'CRESP' and the 'Description' field is empty. The 'Both' radio button is selected. The table below contains one row with 'CRESP' in the 'Rate Code' column and 'CORPORATIVA ESPECIAL' in the 'Description' column.

X	Rate Code	Description
X	CRESP	CORPORATIVA ESPECIAL

For check-ins or arrivals from May 1, 2019 to May 31, 2019

**Rate Strategy - Edit**

Set Restrictions

Rate Category

Room Type

Rate Code

Condition  10  Perc  Flat

Restriction Types

From To

Restriction Dates

Control Dates

Sun Mon Tue Wed Thu Fri Sat

Days in Advance from  to

Sequence

OK Close

whose sales or reservations are made from March 1 to April 30, we also define its counterpart of the restriction

**Rate Strategy - Edit**

Set Restrictions

Rate Category

Room Type

Rate Code

Condition  10  Perc  Flat

Restriction Types

From To

Restriction Dates

Control Dates

Sun Mon Tue Wed Thu Fri Sat

Days in Advance from  to

Sequence

OK Close

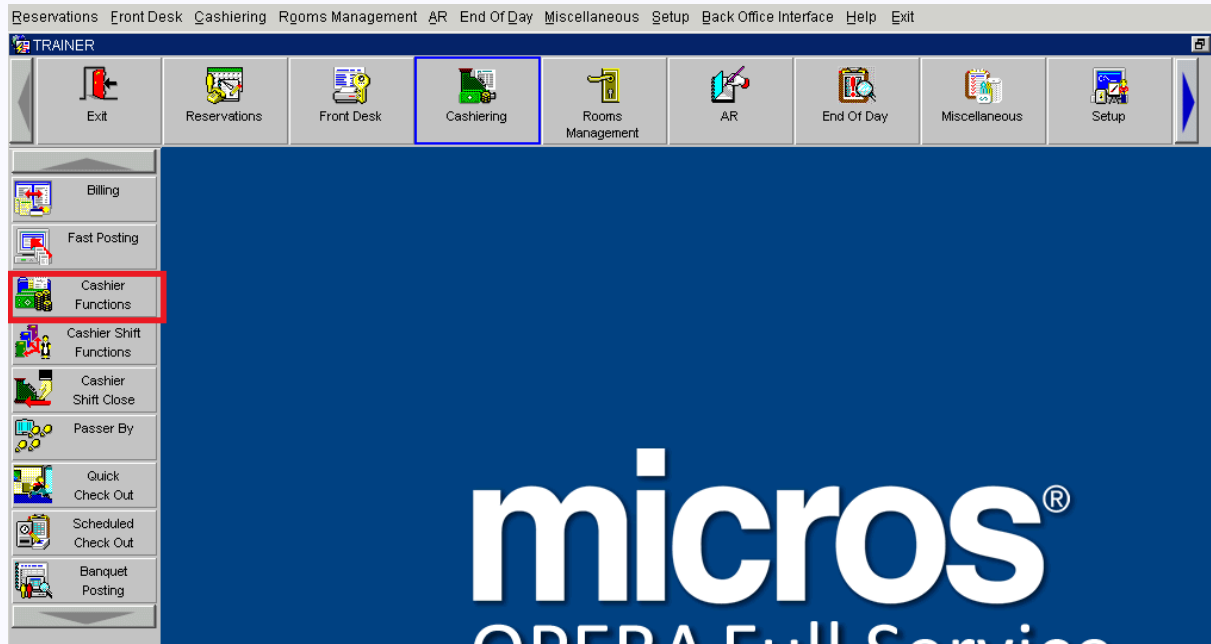
therefore in the Rate screen Strategy must have 2 records per rate restriction.

Room Type	Rate Category	Rate Code	Control Dates	Restriction Dates	Condition	Restriction	Value	Type	Seq
		CRESP	01-03-19 - 30-04-19	01-05-19 - 31-05-19	If Occupancy is Less	Open	10	P	2
		CRESP	01-03-19 - 30-04-19	01-05-19 - 31-05-19	If Occupancy Reaches	Closed	10	P	1

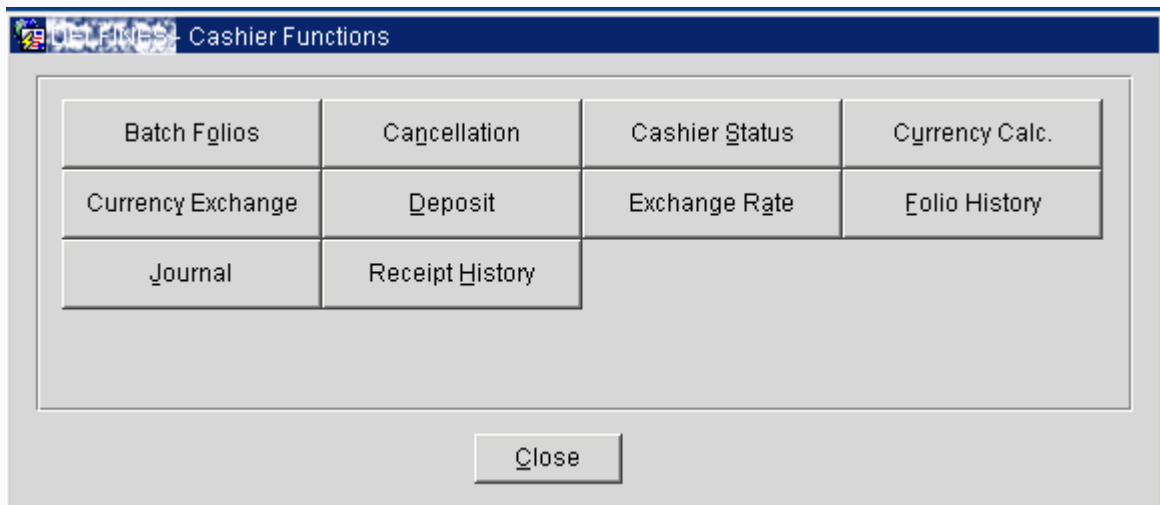
Then we test the defined rate strategy at the time of booking.

## Credit Notes through Credit Bill in Opera PMS We will

make credit notes through CREDIT BILL, enter the Cashiering menu, Cashier Functions option  
The Cashier Functions



form will be displayed



Select the Folio History option the Flio History form will be displayed

X	Folio No.	Date	Name	Wnd.	Folio Amount	Queue Name	Payee Name
	6713	11-03-19	Ortiz-Cordero, Andres Felipe	4	17.46	F0004	Ortiz-Cordero, Andres Felipe
	6714	11-03-19	GFO ABBOTT LABORATOR	2	9,676.80	F0004	ABBOTT LABORATOR
	13231	11-03-19	Pardo Burga, Carlos Eduard	2	159.50	FAEXON	Pardo Burga, Carlos E
	13232	11-03-19	Linsen, Peter Michael	2	775.50	FAEXON	Linsen, Peter Michael
	13233	11-03-19	GPO PERU J & C - MARZO	4	660.00	FAEXON	PERU J & C TOURS E
	13234	11-03-19	Gil Mazon, Luis Francisco	2	110.00	FAEXON	VIAJES PACIFICO S.A.
	13235	11-03-19	Colatan, Martí, Ignacio Vicent	2	110.00	FAEXON	VIAJES PACIFICO S.A.
	13236	11-03-19	Vera Benitez, Ana Isabel	2	1,600.50	FAEXON	Vera Benitez, Ana Isab
	13237	11-03-19	Subotka, Zdenek	1	148.90	FAEXON	Subotka, Zdenek
	13238	11-03-19	Bernedo Ovalle, Monica Aleja	2	327.80	FAEXON	Bernedo Ovalle, Monic

\*\* Consider that only Credit Notes can be issued through CREDIT BILL to vouchers that have been issued one day in advance, otherwise Opera disables the Credit Bill option button, for example, as of today, March 12, only credit notes are allowed to be issued. credit through Credit Bill of vouchers issued until March 11.

\*\* Another consideration to take into account is that the issuance of credit notes must correspond to the series category of the payment receipt, that is, if the series category is F010, credit notes must be issued with the F010 series. if the series category is B011, credit notes must be issued with the B011 series in that correlation. If this correlation does not occur, there is a risk that the central tax administration will reject the credit note issued.

\*\* For this correlation to take place, it is very important that when issuing credit notes, the Tax Type field of the Client's Profile must be changed.

For example, for the issuance of the credit notes for the invoice voucher of the client Liu, Fang

**Folio History**

Date: 11-03-19      Folio No.:       Check Out       AR  
 Room:      Credit Card No.:       Passer By       Noshow  
 Name:      Invoice No.:       Credit Bill  
 First Name:      Fiscal Bill No.:     

No.	Date	Name	Wnd.	Folio Amount	Queue Name	Payee Name
18	11-03-19	Borrego Ovalle, Monica Aleja	2	327.80	FAEXON	Borrego Ovalle, Monica Aleja
19	11-03-19	Gallardo Aguilar, Oscar Erika	2	242.00	FAEXON	Gallardo Aguilar, Oscar Erika
16	11-03-19	Zhang, Qingsha	2	102.40	FACTURA	AMERICAN AIRLINES INC. SUC
7	11-03-19	Liu, Fang	2	102.40	FACTURA	AMERICAN AIRLINES INC. SUC
10	11-03-19	Wang, Yanyan	2	172.00	FACTURA	AMERICAN AIRLINES INC. SUC
19	11-03-19	Yuan, Guangwen	2	102.40	FACTURA	AMERICAN AIRLINES INC. SUC
10	11-03-19	Combeo (Pedriguez, Alek Eri	2	102.40	FACTURA	AMERICAN AIRLINES INC. SUC
11	11-03-19	GPO PERU J & C - MARZO	3	0.00	FACTURA	GPO PERU J & C - MARZO
12	11-03-19	GPO PERU J & C - MARZO	3	-660.00	FACTURA	PERU J & C TOURS E.I.R.L.
13	11-03-19	Martinez, Ricardo Edgard	2	153.60	FACTURA	ZEUS ENERGY S.A.C.

Print Phone Details

Buttons: Search, Credit Bill, Folio, Close

Enter the Reservations Menu Profiles option, in the Profile Search screen find and select Client Profile.

**Profile Search**

Name: Liu, Fang      City / Postal Cd.:      Client ID.:      Search  
 First Name:      Mem. Type / No.:      IATA No.:      Clear  
 View By: View All      Keyword:      Corp No.:        
 Neg. Rates       Show Inactive      Communication:      A/R No.:        
 A/R No.      Passport No.:     

\$	Name	Address	City	Postal Code	Company	A/R No.	VIP	Rate Coc
	LIU, FANG							
	LIU, FANG	China						
	LIU, FANG							
	LIU, FANG	CHINA						
	LIU, FANG						VIP2	
	LIU, FANG							
	LIU, FANG							

Individual: Liu, Fang

Future

Room	Room Type	Arrival	Departure	Rooms	Status	Group/Company	Travel/Source

Buttons: Resv., OK, New, Edit, Close

Click on the Edit option button to display the Individual Profile form with the client's data,

**Individual**

More Fields | Stats & Info | Contact

Address Information: Last Name: Liu, First/Middle: Fang, Language/Title: Sra, Address: China, City: , Postal Cd./Ext.: , Country/State: CN

Internal Information: Salutation: Estimada señora, Date of Birth: XXXXXXX, ID Type: PASSPORT, ID Number: XXXXXXXX26, ID Country: CN, Ref. Curr.: USD, Bus. Seg.: , Mail Action: , Mailing List: , Keyword: , email FA: , Active: , Contact: , History:

Search Name: First: , Name: Liu, Fang, LIU, FANG, Liu, Fang, LIU, FANG

Attributes: Rate Code: , Member No.: , Member Level: , A/R No.: , Last Room: 0304, Last Rate: 80.00, Last Visit: 11-03-19

Options: OK, Save, New, Close

Created By: YLABRADOR On: 10-03-19 23:28 At: DELFINES Updated By: YLABRADOR On: 11-03-19 07:05 At: DELFINES

Select the More Fields option button to view the Tax Type options

More Fields

Tax Type: BOLETA

R.U.C.:

Est. Civil: , Hijos: , Conyugue: , Bd. Conyugue: , Aniversario:

Guest Type: , Profession: , Delfines Preferred: , Nivel TripAdvisor:

OK Close

To properly generate the invoice credit note it is important to change the Tax Type of the Profile from the Client to INVOICE.



More Fields

Tax Type **FACTURA** ↓

R.U.C.

Est. Civil  ↓

Hijos  ↓

Conyugue

Bd. Conyugue

Aniversario

Guest Type  ↓

Profession

Delfines Preferred  ↓

Nivel TripAdvisor  ↓

OK Close

After changing the Tax Type field, we proceed to generate the Credit Bill of the invoice from the Folio History screen.

Folio History

Date  Folio No.

Room  Credit Card No.

Name  Invoice No.

First Name  Fiscal Bill No.

Check Out  AR

Passer By  Noshow

Credit Bill

Search

X	Folio No.	Date	Name	Wnd.	Folio Amount	Queue Name	Payee Name
	14567	11-03-19	L. F. F. F. F.	2	102.40	FACTURA	AMERICAN AIRLINES

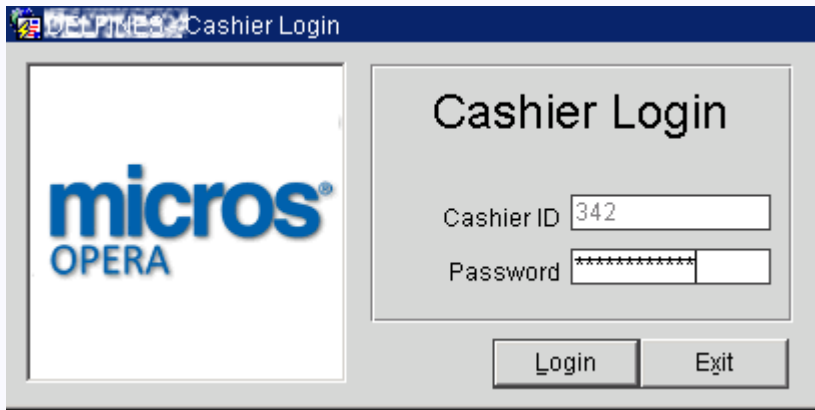
Print Phone Details

Credit Bill

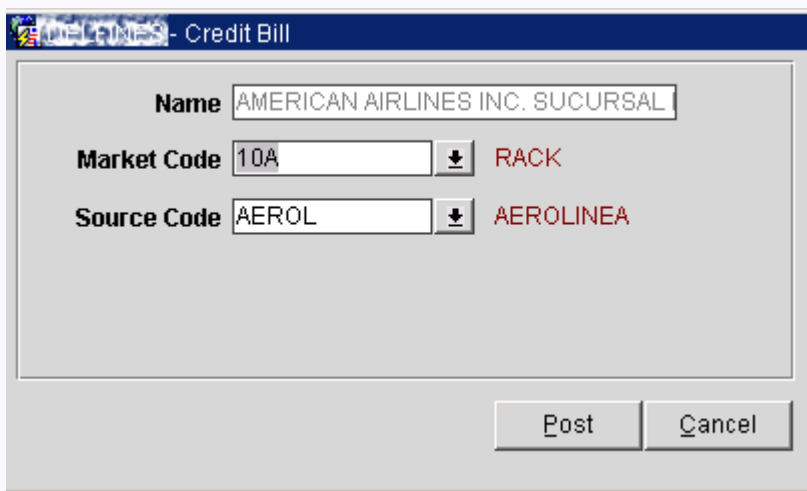
Folio

Close

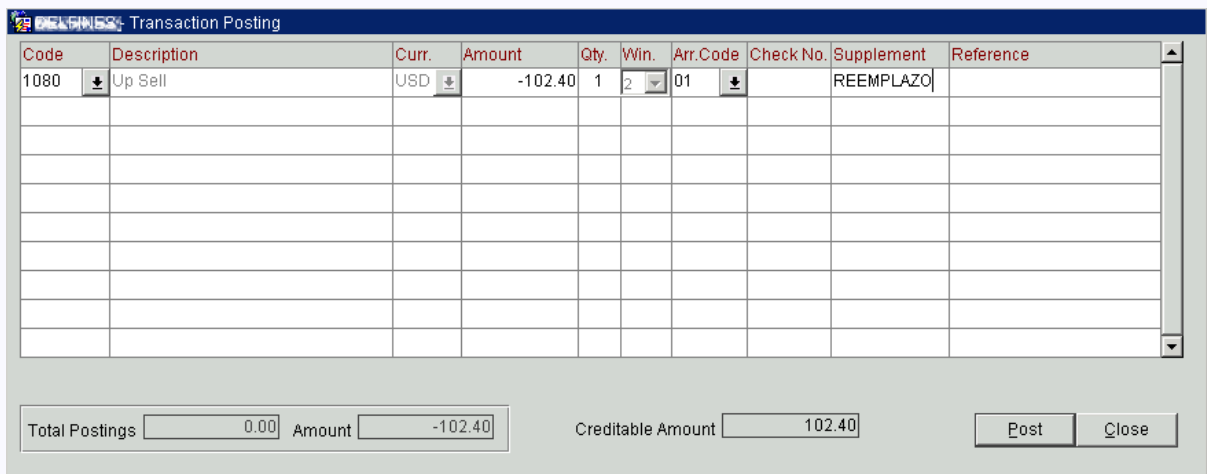
We will be asked for the credentials of the cashier, you



must indicate the Marked Code and Source Code values and then click on the Post option button.



We post the credit note for the same value but negative.



Consider that to carry out the CREDIT BILL, you must use the same market code and the same source that you used to make the reservation.

**Name**   
**Phone**   
**Agent**

**First Name**   
**Member Type**   
**Company** AMERICAN AIRLINE

**Title**  **Country** CN  
**Member No.**   
**Group**

**Language** S **VIP**   
**Member Lvl.**   
**Contact**

**Party**  **Promotions**

---

**More Fields**

**Arrival** 10-03-19 Sunday  
**Nights** 1  
**Departure** 11-03-19 Monday  
**Adults** 1 **Child** 0  
**No. of Rms.** 1 **DNM**   
**Room Type** ST **RTC** ST  
**Room** 0304  
**Rate Code** LALOV **Fixed Rate**   
**Rate** 80.00 **Curr.** USD  
**Packages**   
**Block Code**  **ETA** 23:28

**Res. Type** CHEC **Checked In**  
**Market** 50C LAY OVERS  
**Source** AERC AEROLINEA  
**Origin** FRON En Persona  
**Payment** CA  
**Credit Card No.**   
**Exp. Date**   
**CRS No.**   
**Approval Code**   
**Approval Amt.**   
**Suite With**   
**Confirmation**

**Guest Balance** 0.00  
**Disc. Amt.**  %   
**Reason**   
**Specials**   
**Comments** TARIFA LAY OVER  
**C/O Time** 07:05

**Routing** **Comments**

Created By YLSBRADOR On 10-03-19 Updated By YLSBRADOR On 11-03-19

Transaction Posting

Code	Description	Curr.	Amount	Qty.	Win.	Arr.Code	Check No.	Supplement	Reference
1080	Ajuste Alojamiento	USD	-80.00	1	2	01		prueba	
Total Postings			0.00					Amount	-80.00
								Creditable Amount	102.40

## Rate Strategy Configuration and demo in Opera PMS

This guide configures pricing strategies and demonstrates the application of their restrictions.

### 1. USER PROFILES

Consider the following permissions for reception and reservation profiles:

#### Reception Profile

Permissions for profiles whose users must respect the restrictions of the pricing strategies. This is applicable for cashier or receptionist users.

You must not have the following permissions:

RESERVATIONS \ OVERRIDE RATECODE

BLOCKS \ OVERRIDE BLOCK RATE RESTRICTIONS You

must have the following permissions:

RESERVATION \ RATE CODE CHANGE

#### Profile Reservations

Permissions for profiles whose users can authorize the breaking of price strategy restrictions. This is applicable for supervisory users, senior tellers, or senior reservation staff.

You must have the following permissions:

RESERVATION \ OVERRIDE RATECODE

BLOCKS \ OVERRIDE BLOCK RATE RESTRICTIONS

RESERVATION \ RATE CODE CHANGE

### 2. SYSTEM PARAMETERS You

must indicate the following parameters in the "Application Settings" screen with the values "Y".

Parameter

Value

RATES \ SET RATE CATEGORY RESTRICTIONS

AND

RATES \ SET RATE CODE RESTRICTIONS

AND

### 3. PRICE STRATEGY DEFINITION

To configure the pricing strategies, enter the "Configuration" main menu, the "Configuration" screen will be displayed. screen enter the menu option "Rate Management", option "Rate Strategy", the "Rate Strategy" screen will be displayed.

Room Type	Rate Category	Rate Code	Control Dates	Restriction Dates	Condition	Restriction	Value	Type	Seq
ST		CORP01	01-03-19 - 29-03-19	01-05-19 - 31-05-19	If Occupancy Reaches	Closed	10	P	2
ST		CORP01	01-03-19 - 29-03-19	01-05-19 - 31-05-19	If Occupancy is Less	Open	10	P	1

Click on the "New" button.

Define the direct pricing strategy (<10% occupancy OPEN)

**Rate Strategy - Edit**

Set Restrictions

Rate Category

Room Type  Rate Code

Condition  10  Perc 53 Physical  Flat

Restriction Types

Restriction Dates From  To

Control Dates

Sun  Mon  Tue  Wed  Thu  Fri  Sat

Days in Advance from  to

Sequence

Also define the reverse pricing strategy (> 10% occupancy CLOSED)

The screenshot shows the 'Rate Strategy - Edit' window with the following fields and values:

- Room Type:** ST
- Rate Category:** (empty)
- Rate Code:** CORP01
- Condition:** If Occupany Reaches
- Value:** 10
- Radio Buttons:** Perc (selected), Flat
- Text:** 53 Physical
- Restriction Types:** Closed
- Restriction Dates:** From 01-05-19, To 31-05-19
- Control Dates:** 01-03-19, 29-03-19
- Days:** Sun, Mon, Tue, Wed, Thu, Fri, Sat (all checked)
- Days in Advance from:** (empty) to (empty)
- Sequence:** 1

The dates in the "Restriction Dates" field correspond to the "Arrival" dates of the reservation in which pricing strategies are applied.

The dates in the "Control Dates" field correspond to the dates on which the reservation is registered.

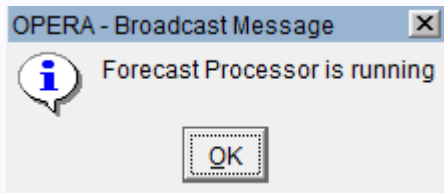
#### 4. LEVEL OF OCCUPANCY AND FORECAST PROCESSORoccupancy

Enter thelevel screen using the Shift + F1 key combination and note that on May 2 there are no reserved rooms.

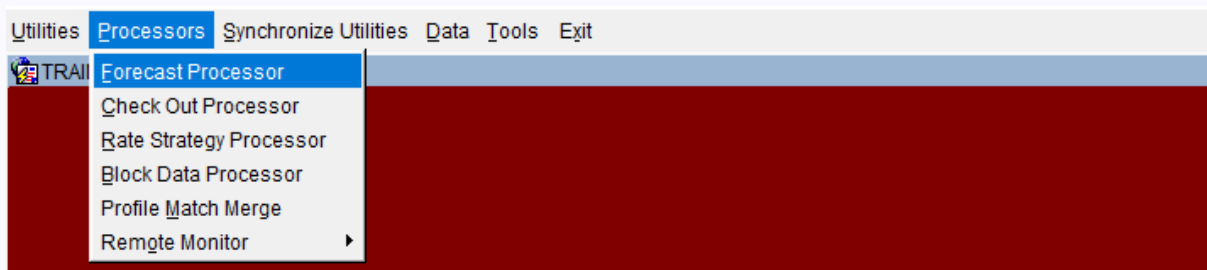


The proper execution of the pricing strategy considers the level of occupancy to apply or not the price restrictions. This level of occupancy requires that the reserved rooms be deducted (Deduct) from the room inventory.

To activate room inventory deductions it is important that the forecast processor is running.



To activate it, enter the "Utilities" main menu, the "Utilities" screen will be displayed. On this screen, enter the "Processors" menu, "Forecast Processor" submenu, the "Forecast Processor Status" screen will be displayed.



On the "Forecast Processor Status" screen, the running process should be shown "Running", otherwise click on the "Start" button.

**Forecast Processor Status** Forecast Processor Threads 1

ID	Inst ID	SID	Started By	Started On	Started At	Status	Events Read
106007	1	661	TRAINING	06-JUN-2019	16:36:33	Running	626

Events Pending

Events Failed

Start

Stog

Setup

Refresh Data

Reque Failed

Close

### 5. RATE CODE CONFIGURATION

We must verify the "Rate Code" configuration, enter the "Rate Management" menu, "Rate Classifications" menu option, "Rate Codes" option. Select the "Rate Code" involved in the "Rate Strategy" and click on the "Edit" button.

Rate Code  Sell Date  Company

Rate Category  Selector

Seq.	Rate Code	Description	Category	Start Sell	End Sell	Currency
2	CORP01	CORPORATIVA 1	CORP	01-01-07	31-12-19	USD

Search

New

Edit

Delete

Close

In the form "Rate Header" make sure that the field "Room Types" has the type of room ST to which we are establishing the pricing strategy, also verify that the date range "Begin Sell Date" and "End Sell Date" is a date range according to the execution dates and control dates of the pricing strategy.



Rate Code

Search

Rate Header | Rate Detail | Negotiated | More

**Rate Code**   
**Description**   
**Rate Category**  Rate Class   
**Folio Text**   
**Begin Sell Date**   
**End Sell Date**   
**Market**   
**Source**   
**Display Sequence**   
**Room Types**   
**Package**   
**Commission %**  **Display Set**   
**Min.Occupancy**  **Max.Occupancy**

**Transaction Details**  
**Transaction Code**   Tax Incl.  
**Pkg Tran Code**   
**Currency Code**   
**Exchange Type**

**Components**  
 Package  Day Use  
 Negotiated  Complimentary  
 Suppress Rate  House Use  
 Print Rate  Day Type  
 Discount  
 Daily Rates

Disable  
 Deposit/Cxl  
 Info  
 Rate Avail  
 Changes  
 Repeat  
 Delete  
 New  
 Save  
 Close

In the "Rate Detail" form, select the record corresponding to the "Room Types" ST considered in the pricing strategy, make sure that the "Start Date" and "End Date" date range is in accordance with the execution dates and the control dates defined in the pricing strategies.

Rate Code

Search

Rate Header | Rate Detail | Negotiated | More

**Dates**  
 Season Code   
**Start Date**   
**End Date**   
 Sun Mon Tue Wed Thu Fri Sat

**Amounts**  
**1 Adult**   
**2 Adult**   
**3 Adult**   
**4 Adult**   
**5 Adult**   
**Extra Adult**

**Children on Own**  
 1 Child   
 2 Children   
 3 Children   
 4 Children   
 1 - 5   
 -   
 -

Start	End	Room Types
12-03-19	31-12-19	EK
12-03-19	31-12-19	ST

**Attributes**  
**Market**  **Source**   
**Room Types**   
**Packages**

Disable  
 Deposit/Cxl  
 Info  
 Rate Avail  
 Changes  
 Split  
 Repeat  
 Delete  
 New  
 Save  
 Close

We leave the records of the “Negotiated” form blank.

Rate Code: CORP01

Search

Rate Header | Rate Detail | **Negotiated** | More

Name	Client ID	Start Date	End Date

Show Inactive

Profile

Disable  
Changes  
Edit  
Delete  
New  
Save  
Close

We leave the fields of the “More” form blank.

Rate Code: CORP01

Search

Rate Header | Rate Detail | Negotiated | **More**

**Routing**

Instructions: [ ] Profile Type: [ ]

**Base Rate**

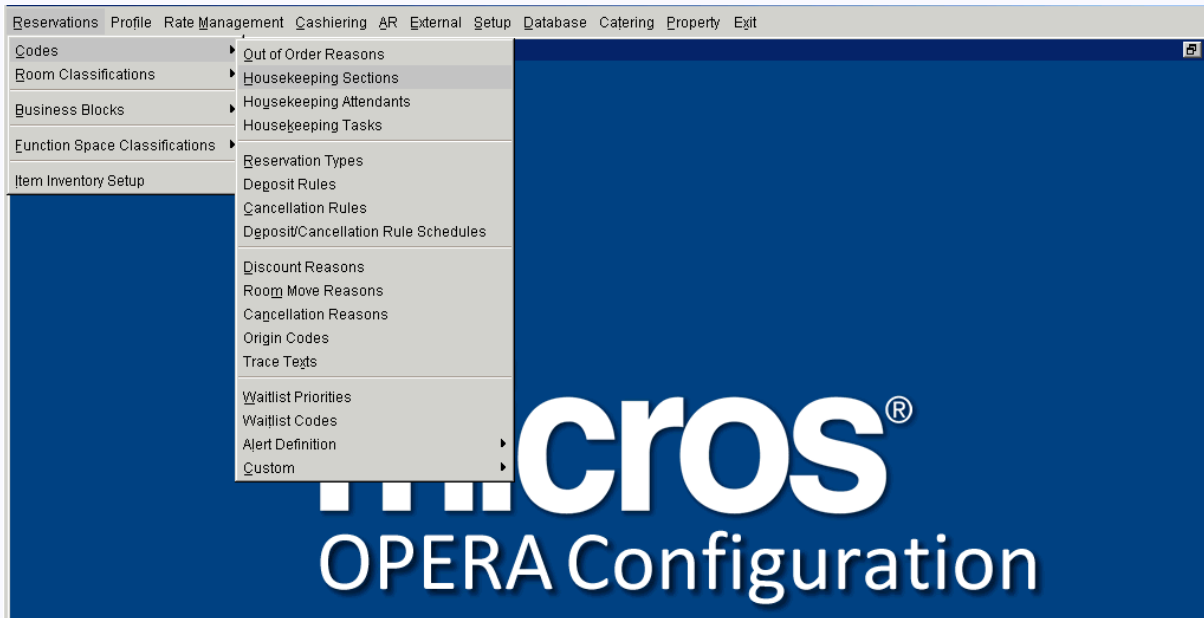
Base Rate: [ ]  
Amount: [ ] [ ] Rounding: [ ]

Disable  
Changes  
Repeat  
Delete  
New  
Save  
Close

## 6. RESERVATION TYPES CONFIGURATION

We must verify the reservation types "Reservation Types" and take into account those reservation types that deduct from the physical inventory of rooms, that is, they make a reservation is confirmed and cannot be canceled.

This is very important because the Rate Strategy only counts the rooms reserved and deducted from the room inventory to verify the level of occupancy.



In the "Reservation Type" screen we must have at least one record as the "Deduct" reservation type.

Resv. Type	Description	Ded. Inv.	Arr. Time	CC	Deposit	Address	Phone	Inactive	Seq.
6PM	Liberar a las 6 pm		X						1
DEP REQ	Deposit Requested								2
GTD CIA	Compañia garantiza	X							3
GTD AGENCIA	Agencia garantiza	X							4
GTD T CDTO	Garantizada por Tarj. Cdto.	X		X					5
<b>GTD DEPOSIT</b>	<b>Garantia Deposito</b>	<b>X</b>							<b>6</b>
GPO TENT	Grupo Tentativo								7
GPO CONFIR	Grupo Confirmado Definitivo	X							8
CHECKED IN	Checked In	X							9
GPO COT	Grupo Cotizado						X		10
GPO FIRM	Grupo Firmado								11
GTD S/OC	Garantizada sin Ord. Compra	X							12
GTD EJ	Garantiza Ejecutivo de Ventas	X							13

Move Up

Move Down

---

Schedule

New

Edit

Delete

Close

**Reservation Type**

**Description**

Display Seq.

Arrival Time Required       Deposit Required  
 Credit Card Required       Address Required  
 Phone Required       Inactive  
 Deduct

### 7. MAKING RESERVATIONS

After the adequate verification of the configuration of the preliminary parameters, we enter the option menu "Reservations", select the option button "New Reservation"

In the "Profile Search" screen, we search for a certain client.

Name	PRUEBA	City / Postal Cd.		Client ID.		Search
First Name		Mem. Type / No.		IATA No.		Clear
View By	Individual	Keyword		Corp No.		
<input type="checkbox"/> Neg. Rates	<input checked="" type="checkbox"/> Show Inactive	Communication		A/R No.		
<input type="checkbox"/> A/R No.		Passport No.				

\$	Name	Address	City	Postal Code	Company	A/R No.	VIP	Rate Coc
	PRUEBA, AREVALO							
	prueba, prueba1							
	PRUEBA							
	PRUEBA INFORMATICA							
	PRUEBA SISTEMAS, SIS							
	PRUEBA SISTEMAS							
	PRUEBAS MICROS							

PRUEBA, AREVALO

Future

Room	Room Type	Arrival	Departure	Rooms	Status	Group/Company	Travel/Source

On the "Reservation" screen, the date in the "Arrival" field must be within the execution range of the price strategy, select the "Room Type" and the "Rate Code" defined in the price strategy.

\*\* important \*\* you must select in the "Res Type" field a type of reservation with Deduct.

Name	PRUEBA	Phone		Agent	
First Name	AREVALO	Member Type		Company	
Title		Member No.		Group	
Country	PE	Member Lvl.		Contact	
Language	S	Party		Promotions	
VIP					

More Fields

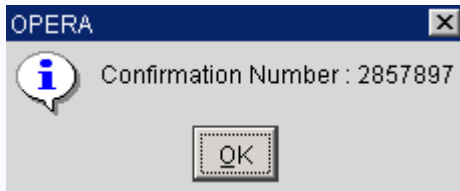
Arrival	02-05-19	Thursday	Res. Type	GTD	Garantia Dep.	Guest Balance	0.00
Nights	1		Market	20A	CORP. PREF	Disc. Amt.	%
Departure	03-05-19	Friday	Source	CORF	CORPORATI	Reason	
Adults	1	Child 0	Origin			Specials	
No. of Rms.	1	DNM	Payment	CA		Comments	
Room Type	ST	RTC. ST	Credit Card No.				
Room	0204		Exp. Date				
Rate Code	CORP01	Fixed Rate	CRS No.				
Rate	400.00		Approval Code				
Packages		Total	Approval Amt.				
Block Code		406.00	Suite With				
		ETA	Confirmation	<input type="checkbox"/>			
						C/O Time	

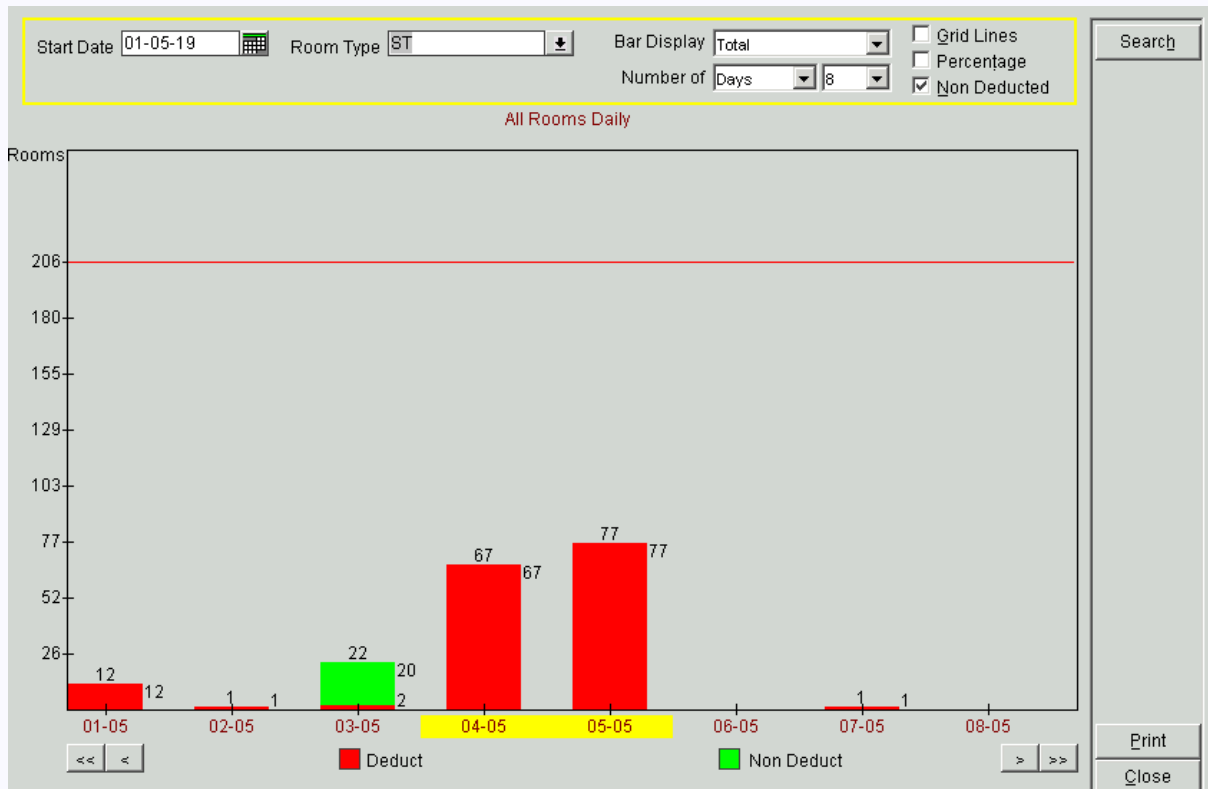
No Post

Save OK

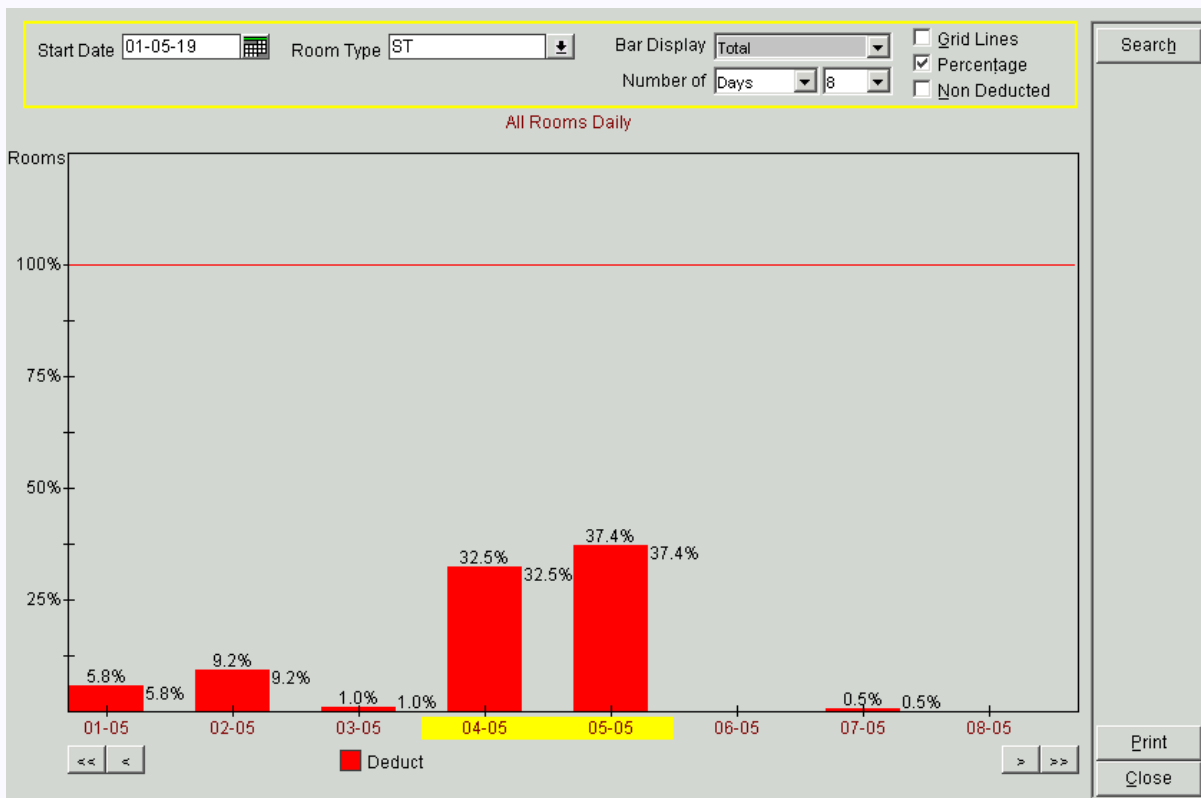
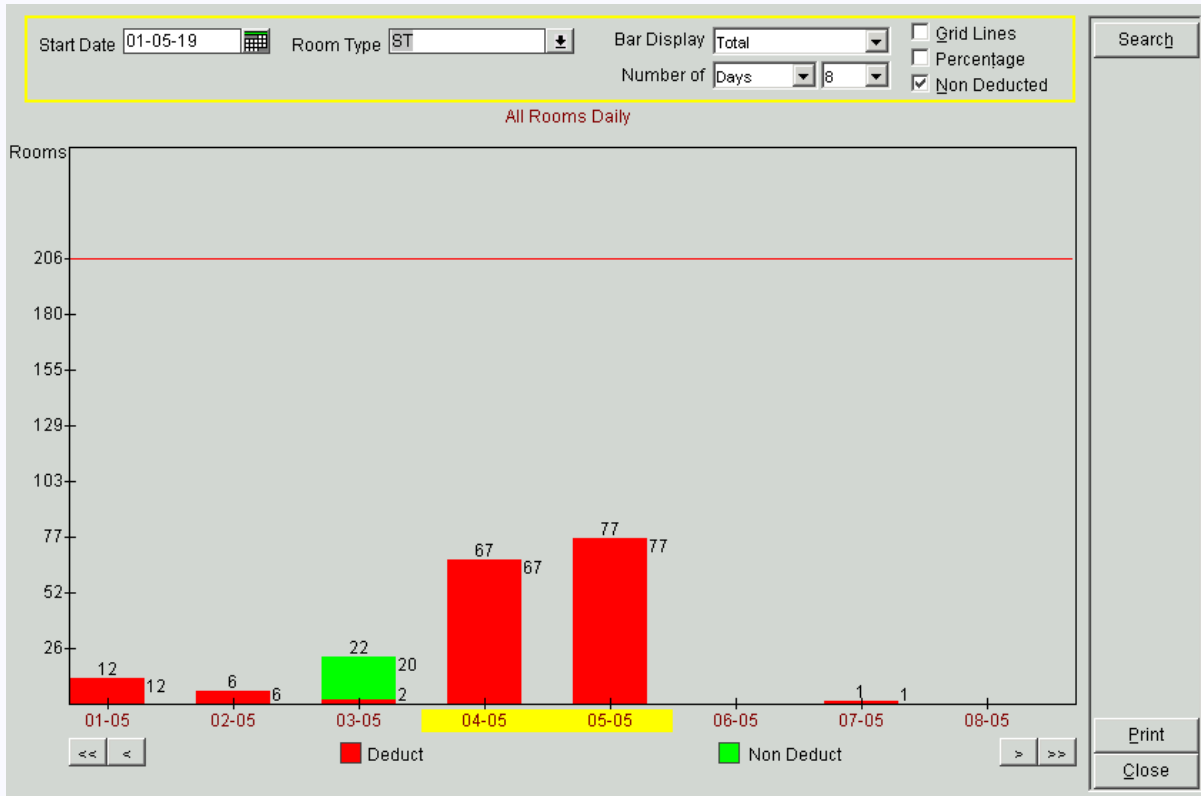
As long as the restriction rule does not reach the limit of the direct pricing strategy (<10% occupancy OPEN), reservations are made on a daily basis.



Once the reservation has been made on the occupancy screen (Shift + F1) on May 2, we observe that there is 01 room reserved and deducted from the inventory (Deduct).



We make reservations with the Cashier profile for the number of rooms required to cover 10% occupancy (limit of the pricing strategy).



In the next reservation intention, the “Rate Query Details” screen will be displayed with the price in “Close” status, which confirms that the pricing strategy restricts the allocation of the price.

Thursday, May 02, 2019; 1 Nights , 1 Rooms , 1 Adults , 0 , 0 , 0

Room Types	SK	ST	PK	PT	EK	ET	JS	SS	DL		
Include Overbooking	81	34	9	11	22	5	7	12	4		
Physical Inventory	81	34	9	11	22	5	7	12	4		
CORP01	USD	Pkg.				206.00					
RACK1	USD	Pkg.	900.00	900.00	1,050.00	1,050.00	1,250.00	1,600.00	2,150.00	2,500.00	
WIN01	USD		174.00	174.00	189.00	189.00	209.00	244.00	299.00	334.00	
CRCAN	USD	Pkg.	450.00	450.00	465.00	465.00	485.00	520.00	575.00	610.00	
PQESC	USD	Pkg.	120.31	120.31	132.03	132.03	147.65	147.65	175.00	217.97	245.31
PRFDS	USD	Pkg.	135.94	135.94	147.66	147.66	163.28	163.28	190.63	233.59	260.94
RAVIP	USD	Pkg.	165.00	165.00	180.00	180.00	215.00	215.00	250.00	305.00	340.00
CPLHA	USD		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
CPLBQ	USD		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
CPLCO	USD		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
CPLDC	USD		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

406.00

Average Rate  
  Total Rates  
  First Night  
 Closed  
 Negotiated  
 Day Use     Promotion  
 Rate Code

Info: CORPORATIVA 1 , Superior Twin

Promotions:

Events:

Thursday, May 02, 2019; 1 Nights , 1 Rooms , 1 Adults , 0 , 0 , 0

Room Types	SK	ST	PK	PT	EK	ET	JS	SS	DL		
Include Overbooking	81	34	9	11	22	5	7	12	4		
Physical Inventory	81	34	9	11	22	5	7	12	4		
CORP01	USD	Pkg.				206.00					
RACK1	USD	Pkg.	900.00	900.00	1,050.00	1,050.00	1,250.00	1,600.00	2,150.00	2,500.00	
WIN01	USD		174.00	174.00	189.00	189.00	209.00	244.00	299.00	334.00	
CRCAN	USD	Pkg.	450.00	450.00	465.00	465.00	485.00	520.00	575.00	610.00	
PQESC	USD	Pkg.	120.31	120.31	132.03	132.03	147.65	147.65	175.00	217.97	245.31
PRFDS	USD	Pkg.	135.94	135.94	147.66	147.66	163.28	163.28	190.63	233.59	260.94
RAVIP	USD	Pkg.	165.00	165.00	180.00	180.00	215.00	250.00	305.00	340.00	
CPLHA	USD		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CPLBQ	USD		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CPLCO	USD		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
CPLDC	USD		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

406.00

Average Rate  
  Total Rates  
  First Night  
 Closed  
 Negotiated  
 Day Use     Promotion  
 Rate Code

Info: CORPORATIVA 1 , Superior Twin

Promotions:

Events:

**OPERA**

Closed due to strategy. Override?

Yes    No

If you wish to proceed with the assignment, the price assignment permission request screen will be displayed. This authorization is provided by a Supervisor user.



Thursday, May 02, 2019; 1 Nights , 1 Rooms ,1 Adults ,0 , 0

Room Types	SK	ST	PK	PT	EK	ET	JS	SS	DL	
Include Overbooking	81	34	9	11	22	5	7	12	4	
Physical Inventory	81	34	9	11	22	5	7	12	4	
CORP01	USD	Pkg.			206.00					
RACK1	USD	Pkg.	900.00	900.00	1,050.00	1,050.00	1,250.00	1,600.00	2,150.00	2,500.00
WIN01	USD		174.00	174.00	189.00	189.00	209.00	244.00	299.00	334.00
CRCAN	USD	Pkg.	450.00	450.00	465.00	465.00	485.00	520.00	575.00	610.00
PQESC	USD	Pkg.	120.31							245.31
PRFDS	USD	Pkg.	135.94							260.94
RAVIP	USD	Pkg.	165.00							340.00
CPLHA	USD		0.00							0.00
CPLBQ	USD		0.00							0.00
CPLCO	USD		0.00							0.00
CPLDC	USD		0.00							0.00

406.00 << <


Average Rate  
  Total Rates  
  First Night  
 Closed  
 Negotiated  
 Day Use  
  Promotion

Rate Code

Promotions

Events

Overrides



User: SUPERVISOR

Password:

OK Close

## 8. REPORTS ASSOCIATED WITH RATE STRATEGY

If you wish to review the behavior of the pricing strategies, use the following reports: Report

name

.rep File

Restrictions Detail

raterest.rep

Reservation Rate Check

res\_rate\_check.rep

Reservations made On by Ratecode

paris\_reservationsmadeonbyratecode.rep

## Creation of reports with Opera PMS and Oracle Reports Developer.

To create custom reports in Opera, you must first create the SQL statement that will obtain the report data from the Oracle database of Opera, then design the report in the Oracle Reports Developer tool and at the end assign an option in the reports list available from Opera.

It is very important to use the correct version of Oracle Reports Developer, usually this tool is installed by the Opera PMS provider.

Opera | Oracle Reports Developer

v 5.0 | v 10.1.2.0.2

v 5.5 | v 11.1.2.2.0

In this blog we will make a report that lists the list of hosted clients.

We carry out the SQL statement that extracts the data from the Oracle database of Opera.

SQL

```
SELECT a.room, trim (initcap (a.guest_first_name)) || ' ' || trim (initcap (a.sname)) As Name,  
trim (a.company_name) || ' ' || a.travel_agent_name As Company,  
a.resv_status, a.arrival, a.departure  
FROM reservation_general_view to  
WHERE (a.resv_status = ' CHECKED IN ' OR a.resv_status = ' DUE OUT ' )  
ORDER BY a.room We will
```

use the view “reservation\_general\_view”, this view has the necessary query to extract the data of all the reservations of the clients, in their different states:

CHECKED IN

PROSPECT

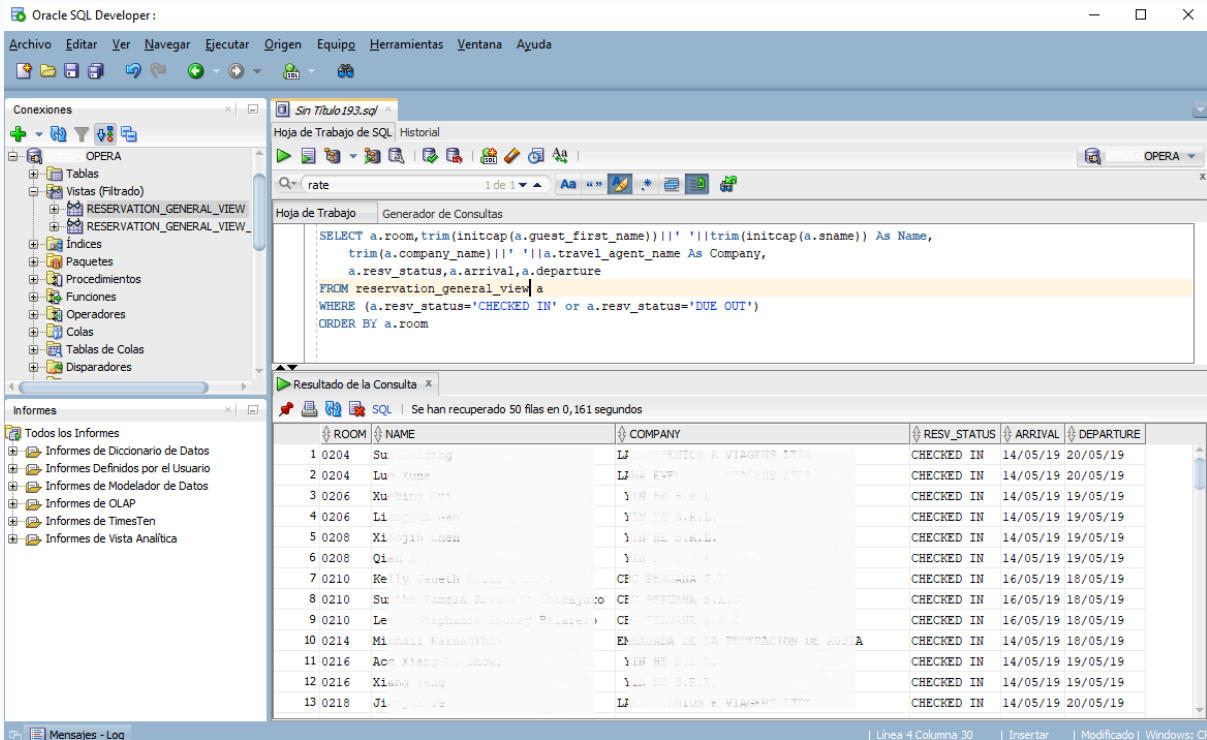
CANCELLED

NO SHOW

CHECKED OUT

RESERVED

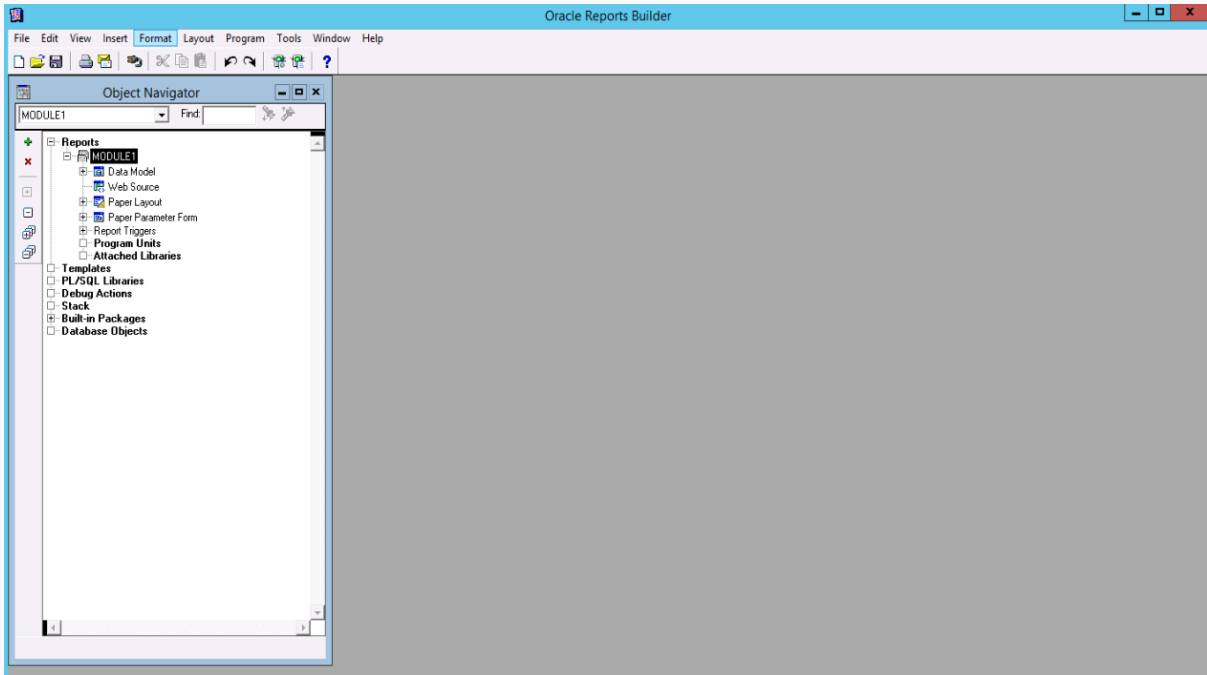
We execute this query in the Oracle SQL Developer development environment to validate That the query works properly



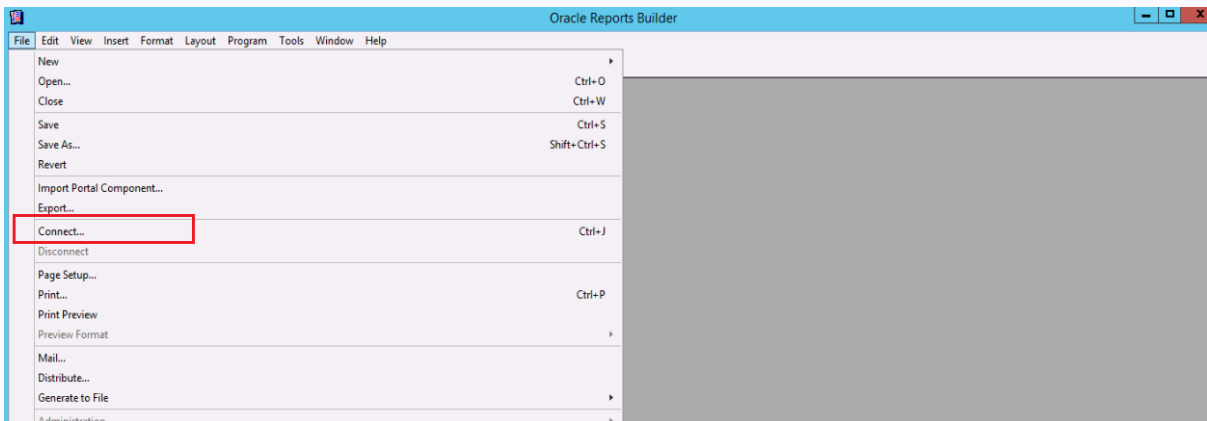
We execute the design program Oracle Reports Developer



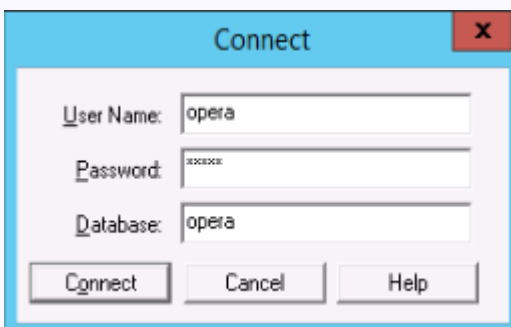
The Builder will be shown



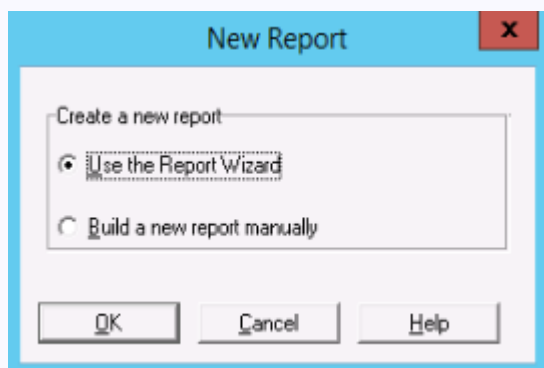
We connect the builder to the database, for this we select the "File" menu option "Connect ...",



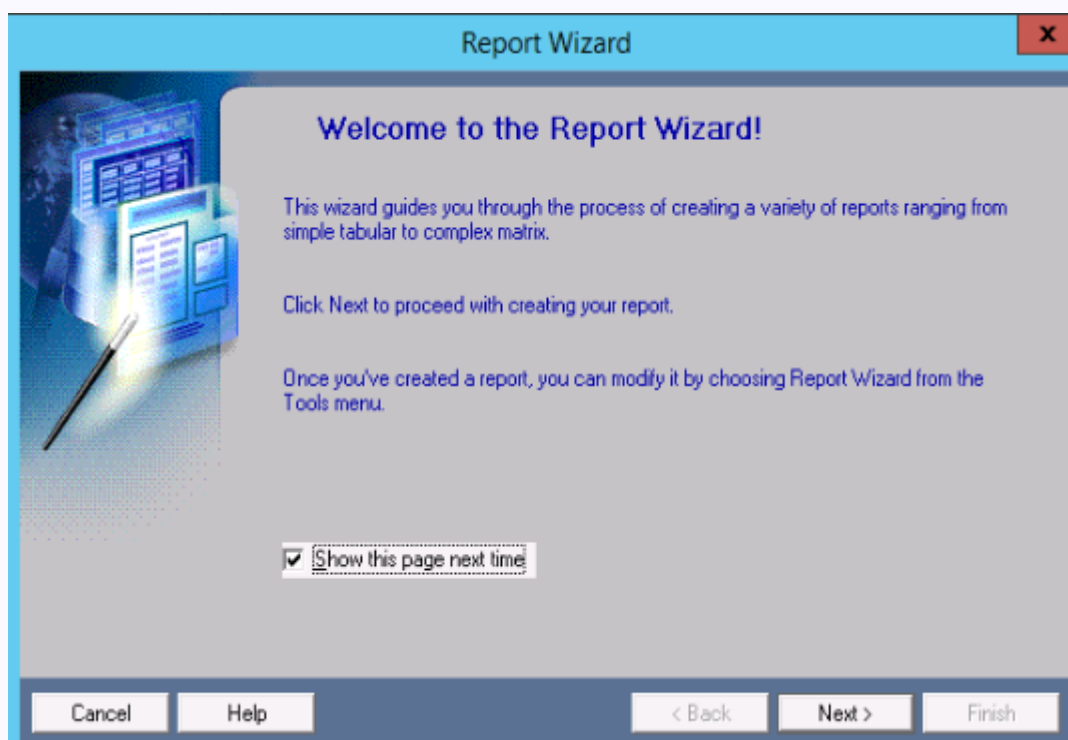
The connection wizard will be displayed to the database where you must put the User, Password and the instance name of the Oracle database. then click on the radio button "Connect" to connect to the database.



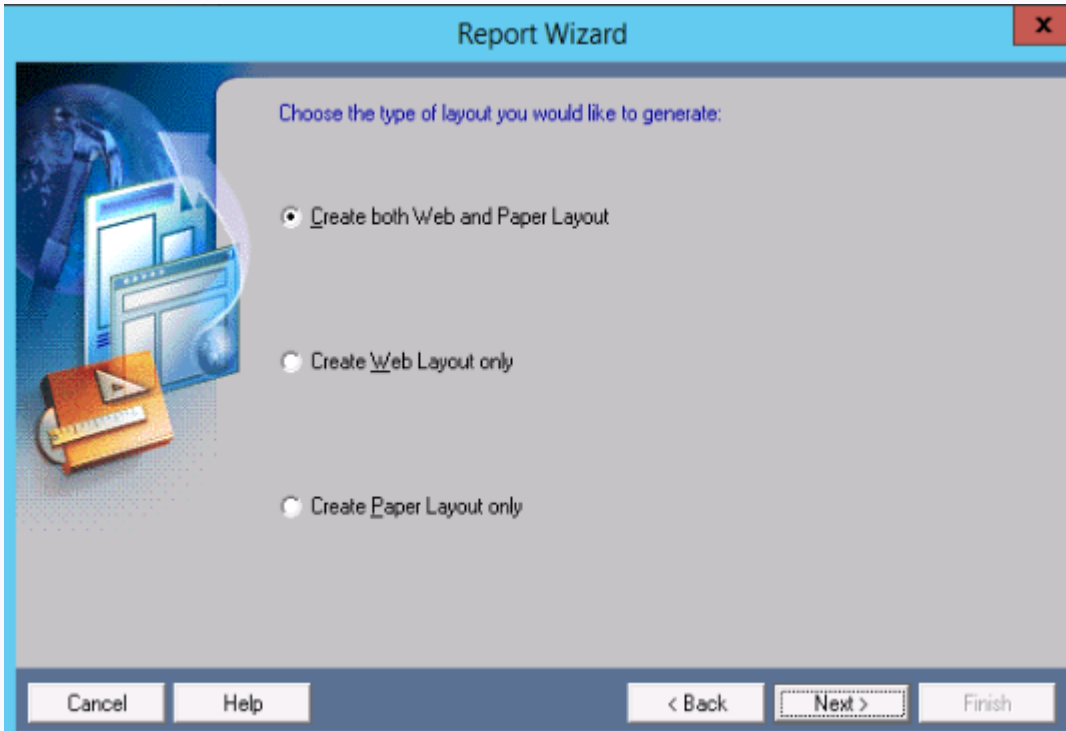
Select the "File" Menu, "New" / "Report..." menu option, the "New Report" wizard will be displayed. select the option "Use the Report Wizard" and click on the option button OK



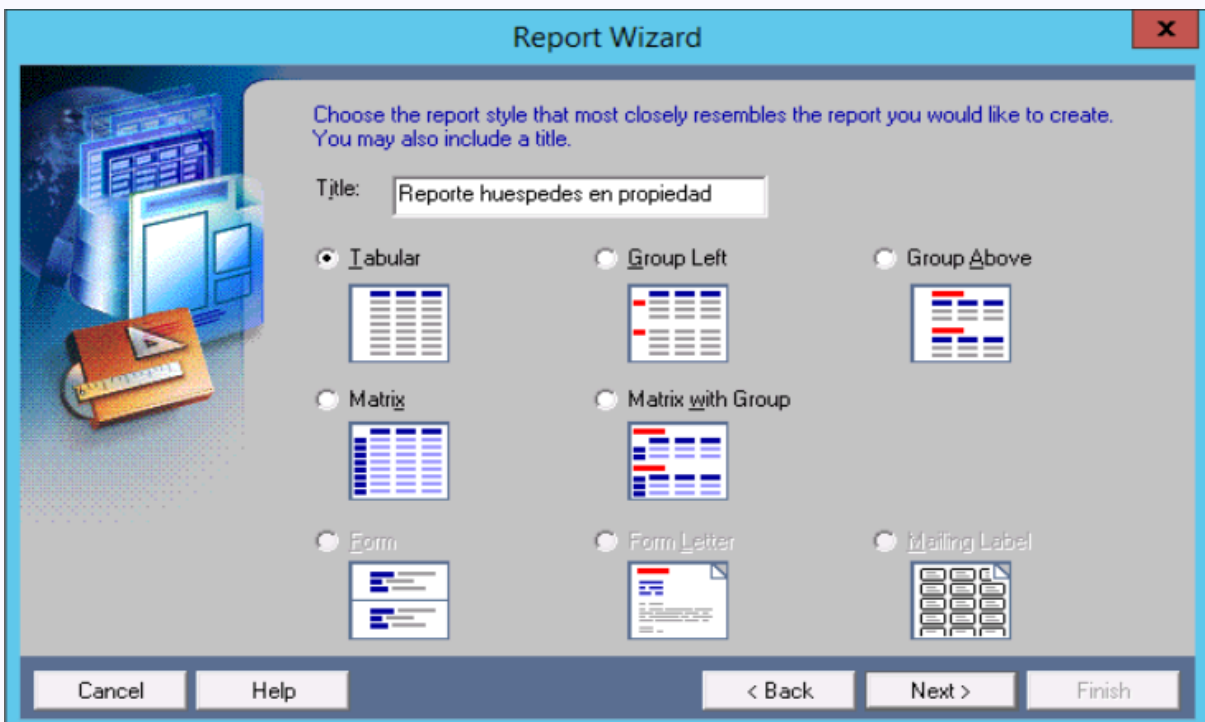
The wizard “Report Wizard!” will be displayed, click on the option button “Next>”



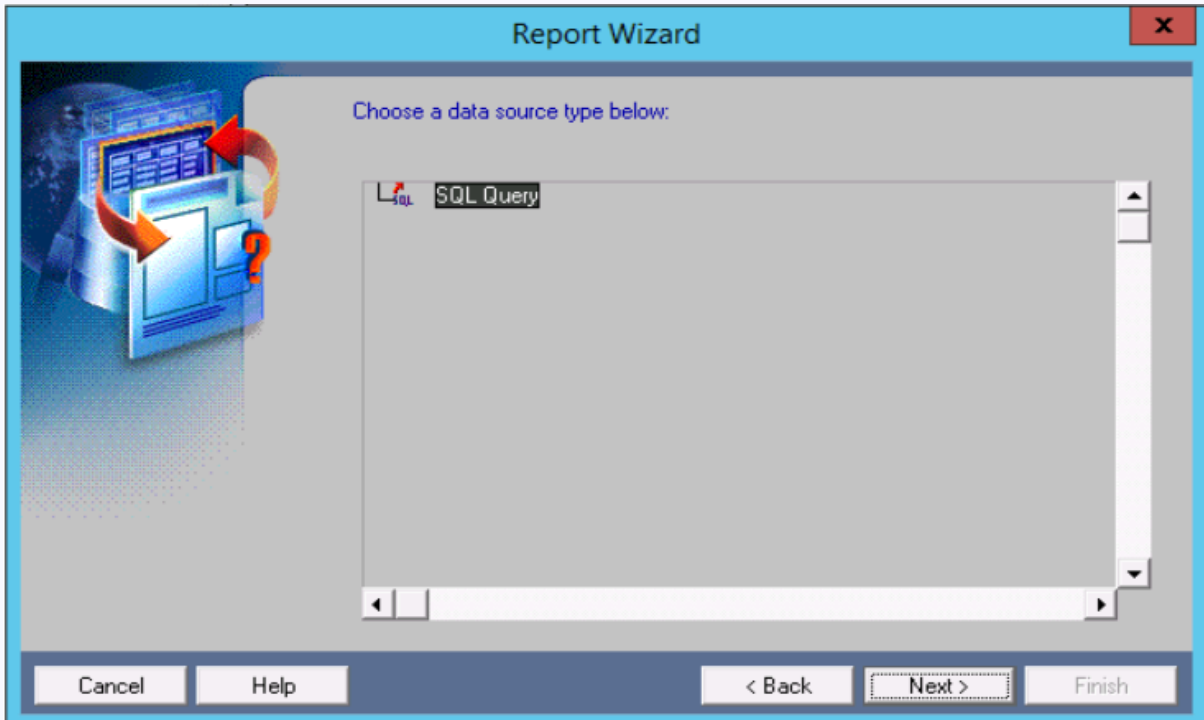
Keep the option “Create both Web and Paper Layout” selected by default and click on the “Next>” button.



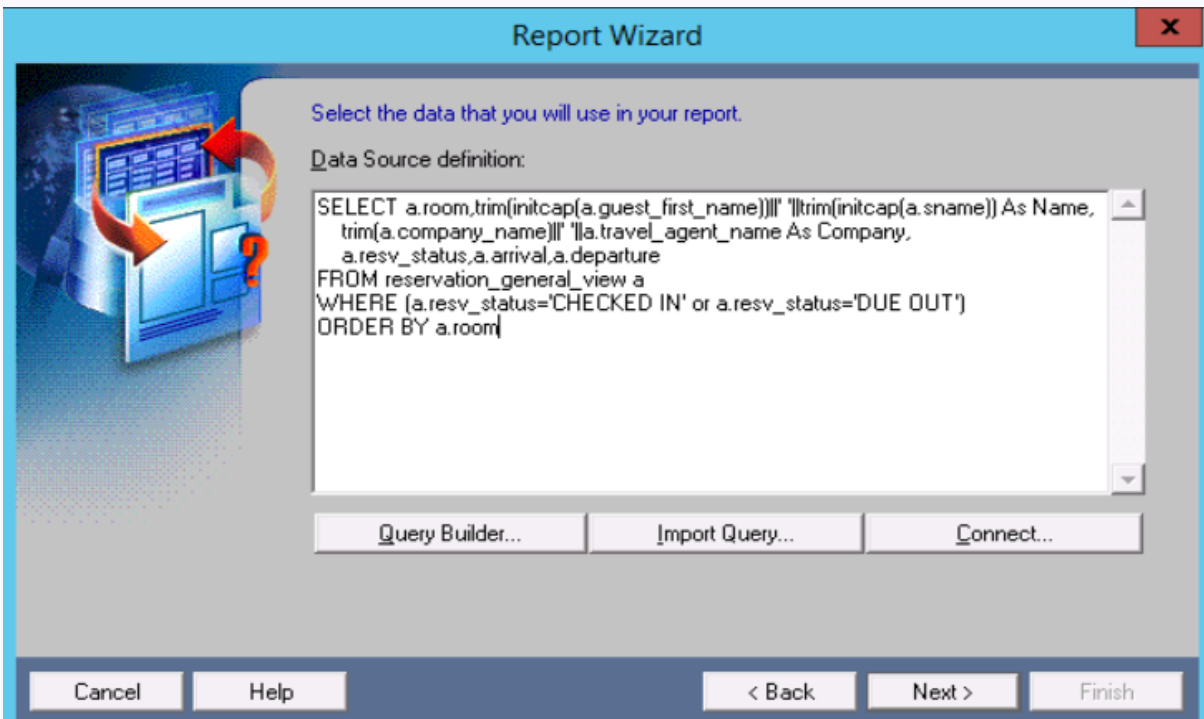
We place the name of the report "Report guests in property" and click on the "Next>" button.



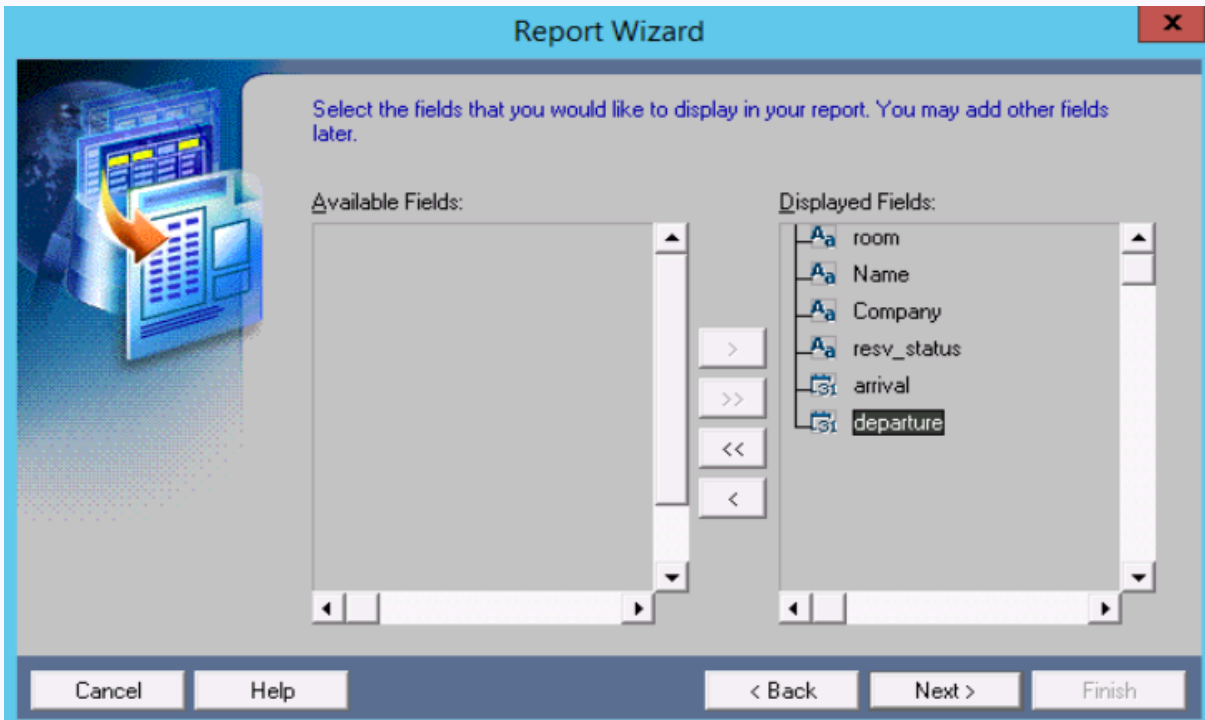
We select the option "SQL Query" and click on the option "Next>".



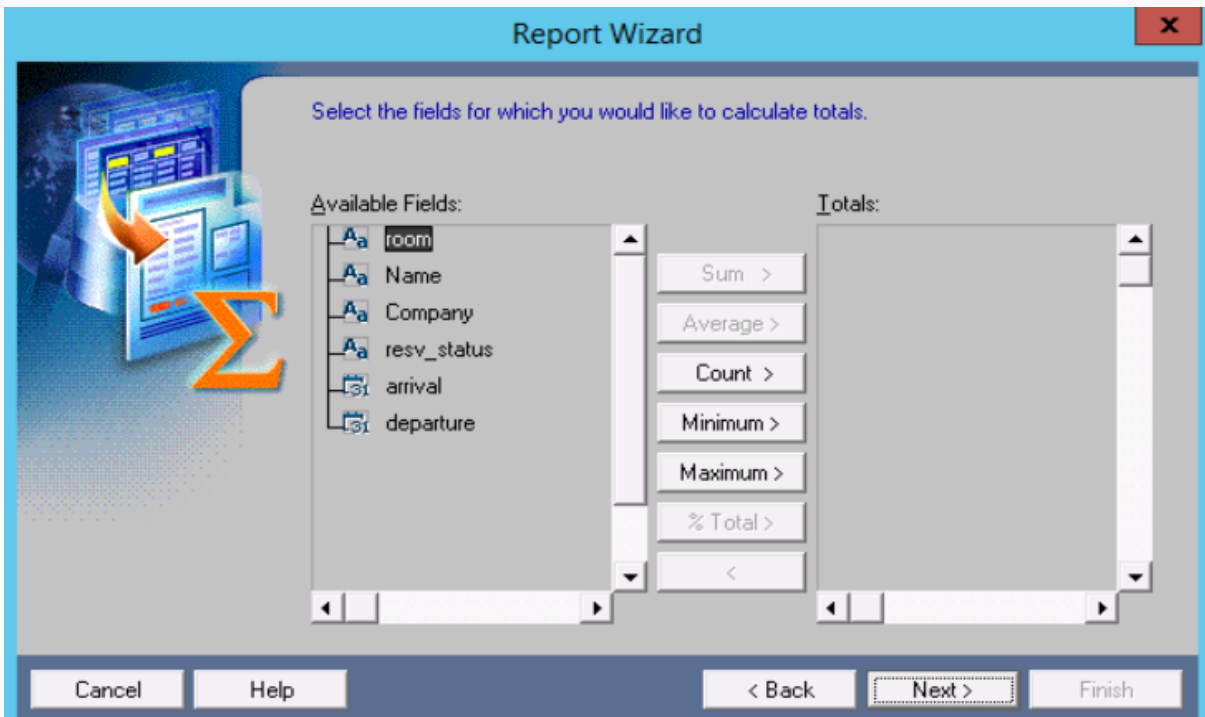
In the Data Source definition screen we place the SQL Query that allows the extraction of data from the reservations and we click on the “Next>” option.



We select all the fields of the Query that will be shown in the report and we click on the “Next>” option.

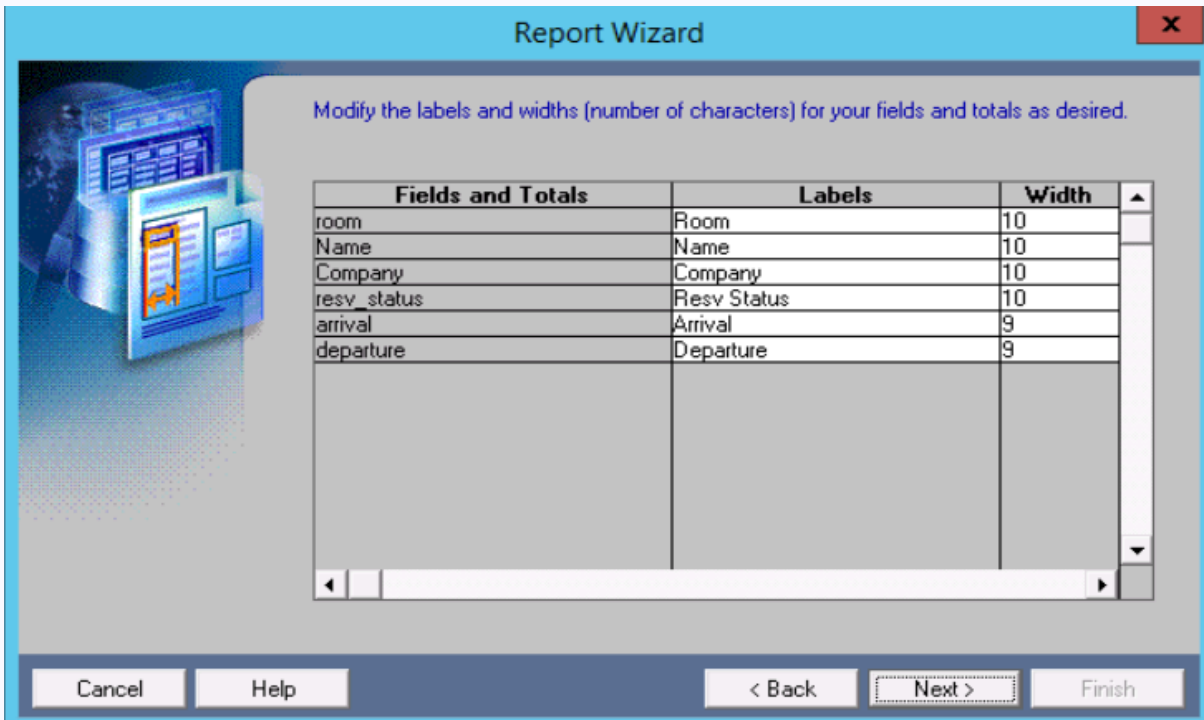


In the totalized fields calculation screen, it is not necessary to totalize by a certain field, we click on the "Next>" option.

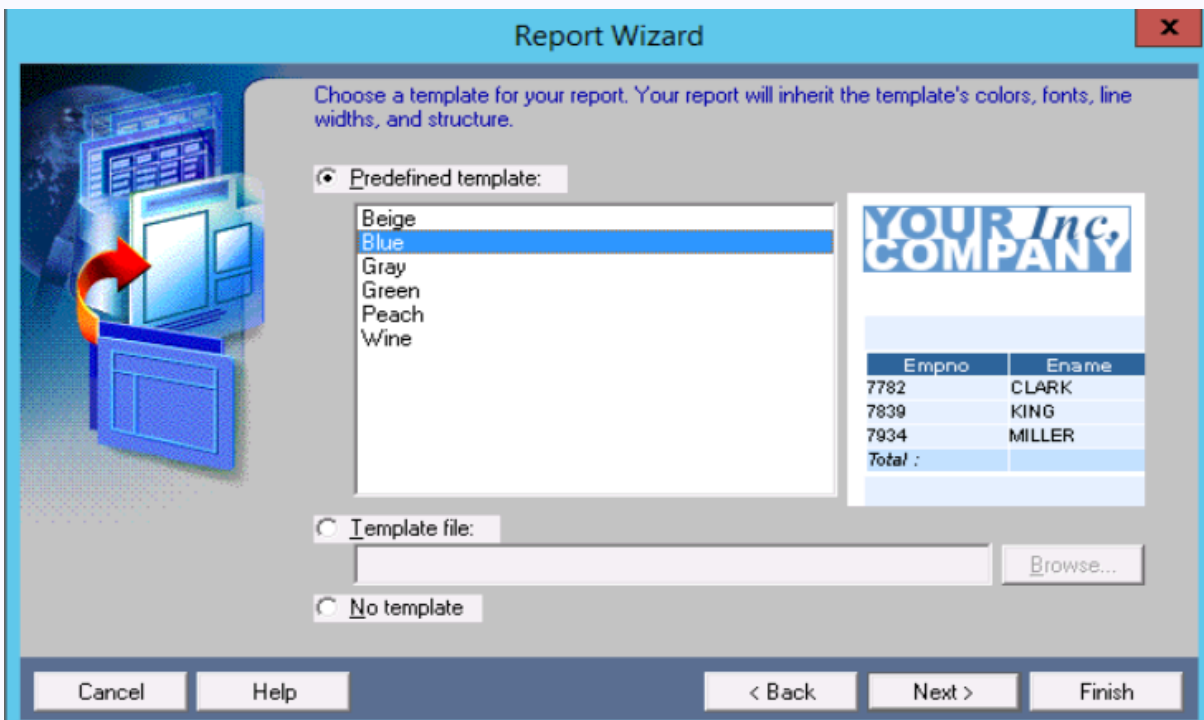


In this screen we keep the width of the labels and we click on the option "Next>" We

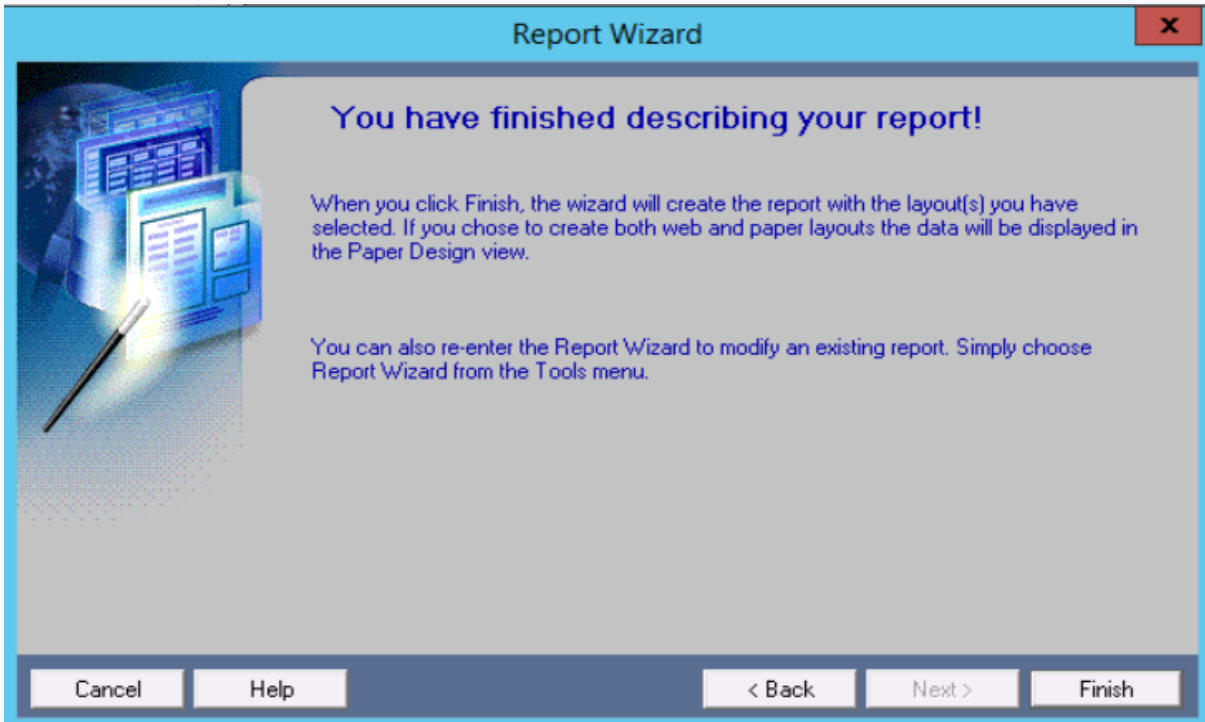




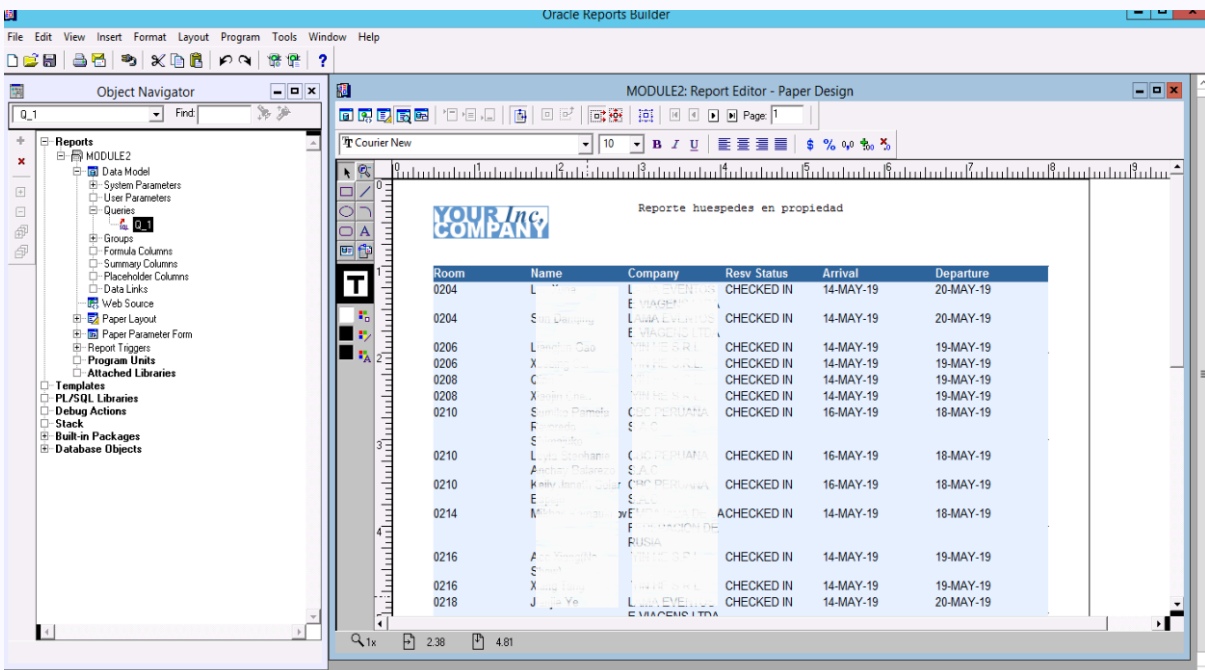
select a report template and click on the option "Next>"



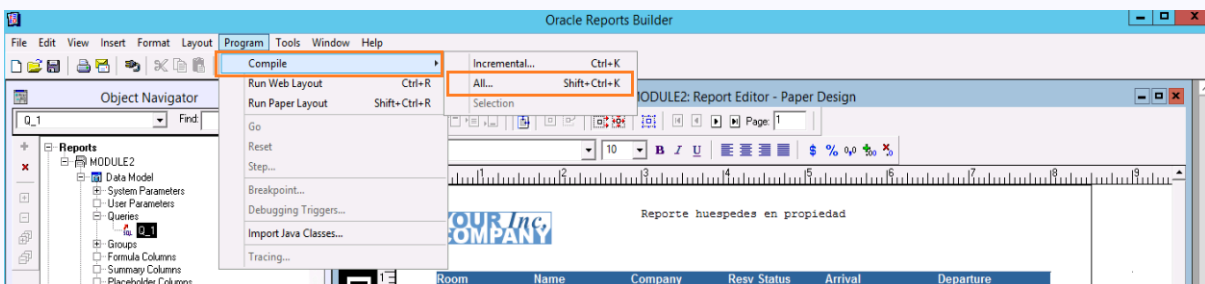
We click on finish to then preview the report design of the report



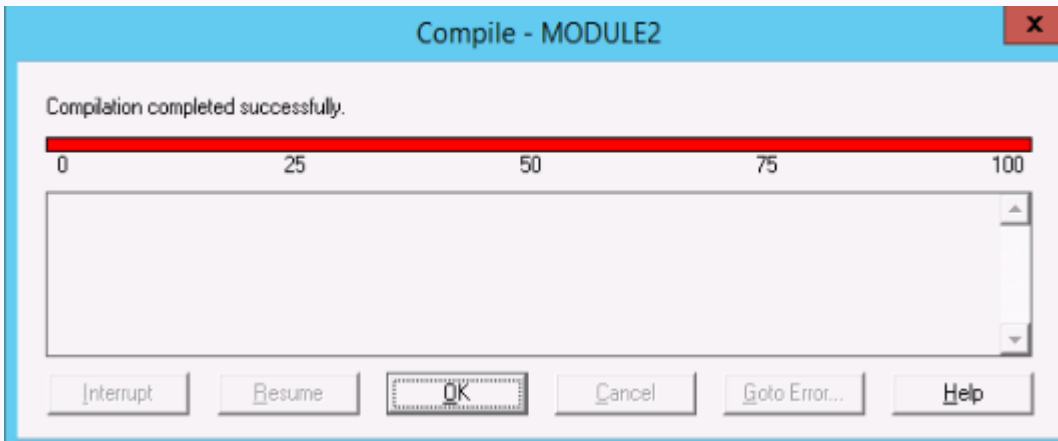
The pre-will be displayed report as follows We



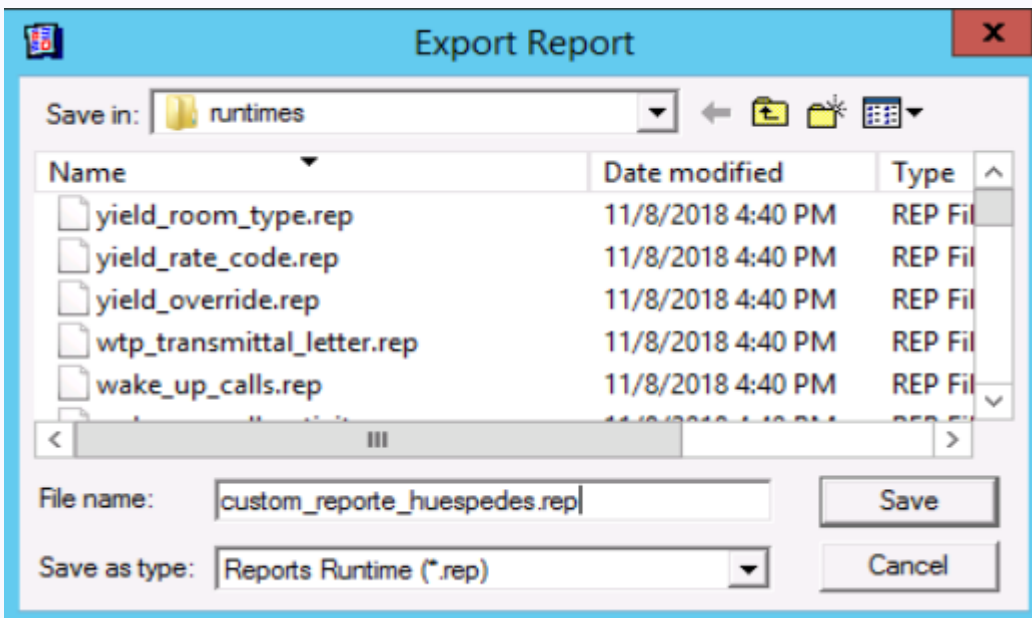
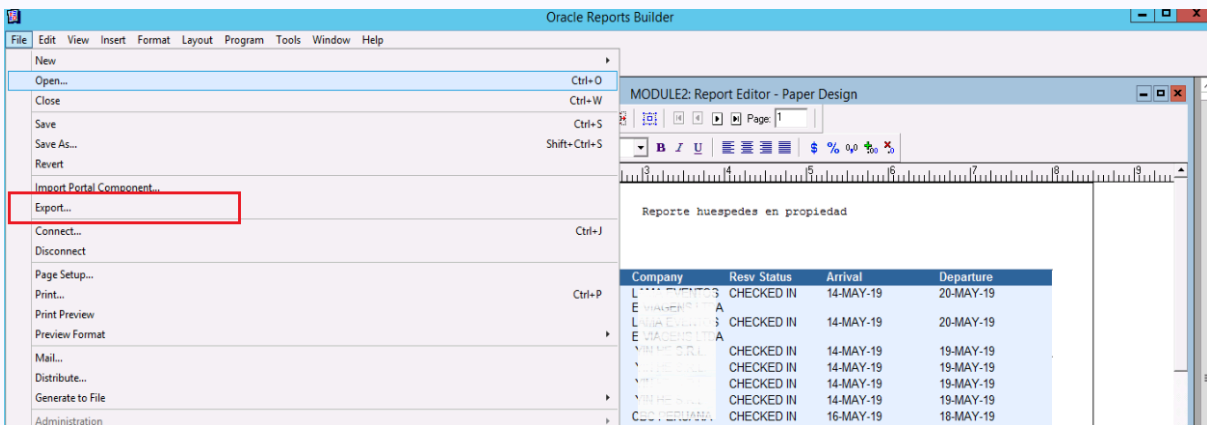
compile the report by clicking on the "Compile" menu, "All .." menu option.



Click on Ok to confirm the compilation process.



After compiling the report it is important to export the report file in .rep format, a format that can be used from Opera.

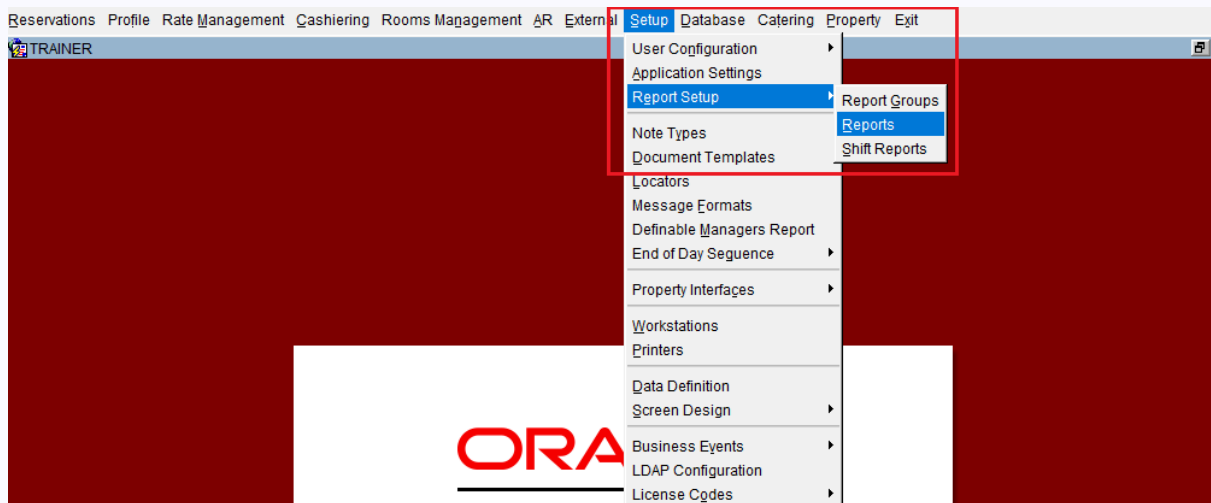


The .rep report files must be placed in the runtimes \ folder located at the following address: D: \ MICROS \ OPERA \ production \ runtimes \ We

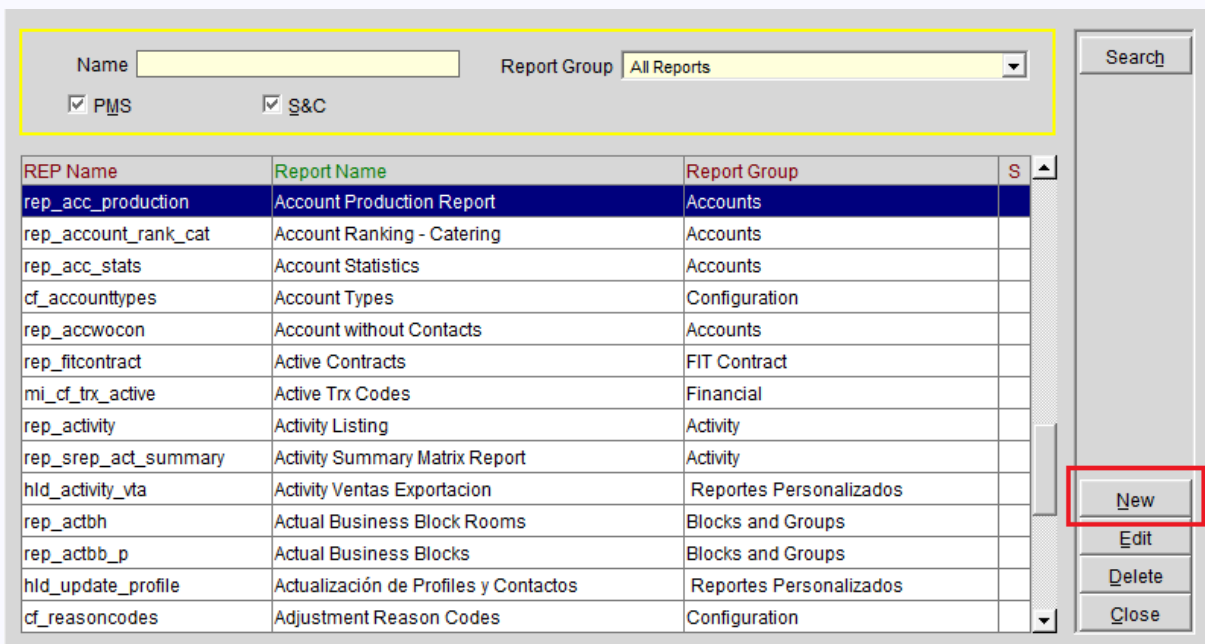
enter the Opera Configuration module.



Select the menu options "Setup", menu option "Report Setup" option "Reports"



The "Reports - Configuration" screen will be displayed, click on the "New" button.



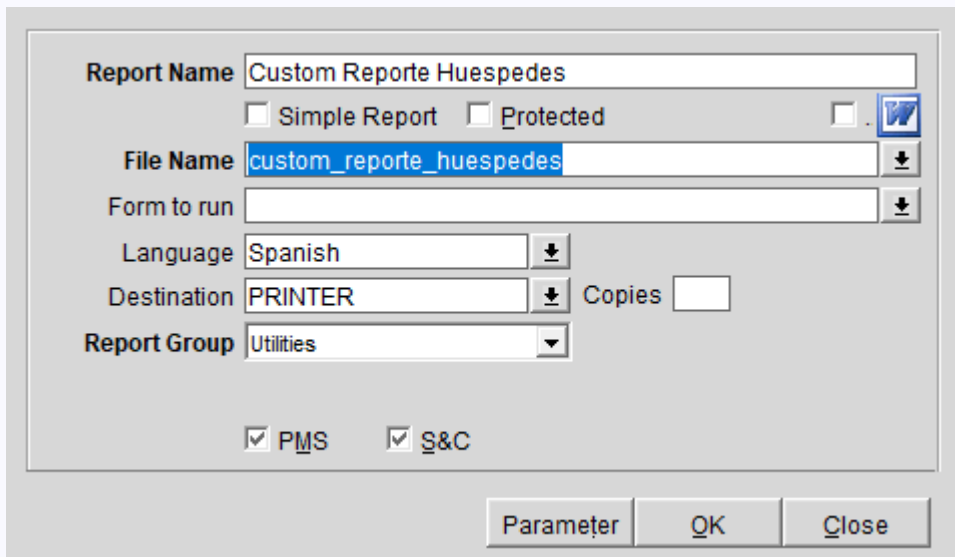
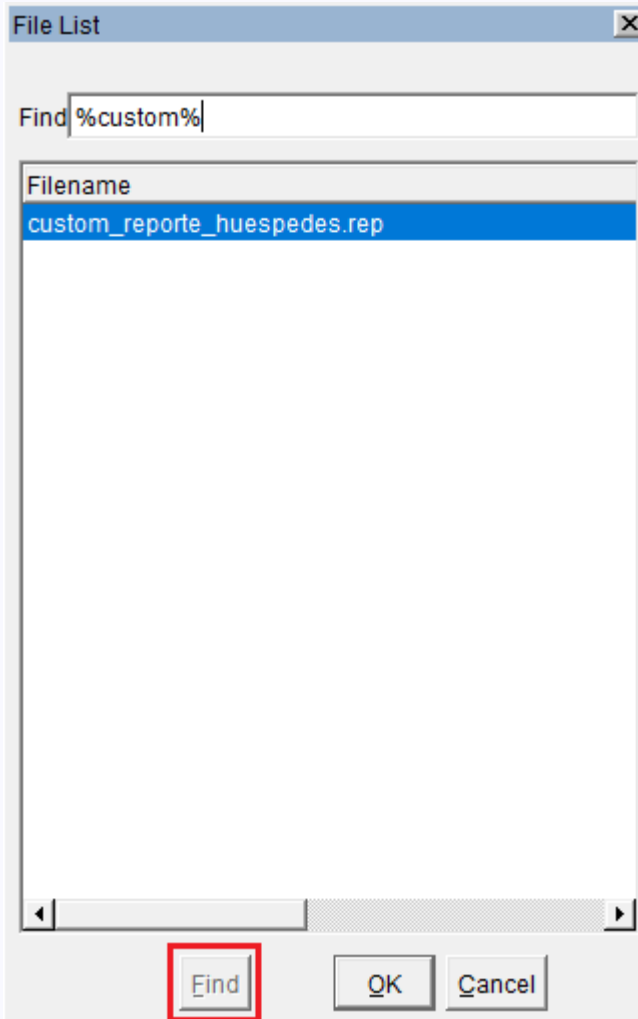
On the "Reports - New" screen, place the name of the report and select a specific "Report Group".

The screenshot shows a configuration dialog box for a report. The fields are as follows:

- Report Name:** Custom Reporte Huespedes
- Options:**  Simple Report,  Protected,  [icon]
- File Name:** [empty] [list selection button]
- Form to run:** [empty] [list selection button]
- Language:** Spanish [list selection button]
- Destination:** PRINTER [list selection button] Copies: [input field]
- Report Group:** Utilities [list selection button]
- Checkboxes:**  PMS,  S&C

Buttons at the bottom: Paramẽter, OK, Close

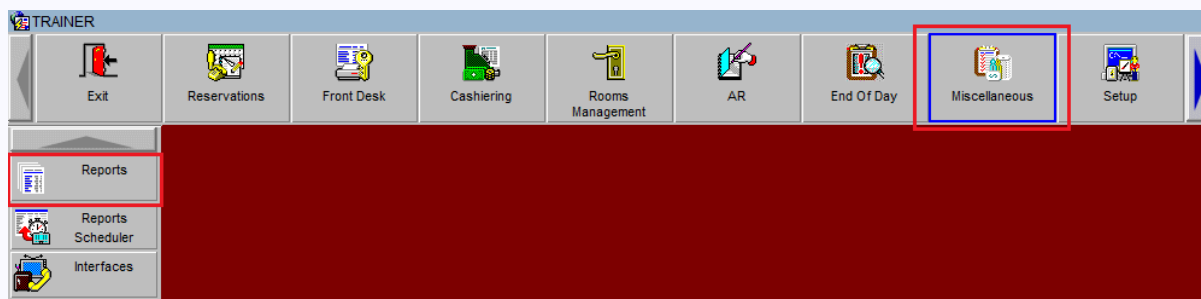
We click on the list selections button associated with "File Name". In the "File List" screen we look for the report file .rep.



We make sure that the report custom\_report\_huespedes.rep is in the "Reports - Configuration" screen.

REP Name	Report Name	Report Group	S
custom_reporte_huespedes	Custom Reporte Huespedes	Utilities	S

To show the new report, we select the option button "Miscellaneous", option "Reports", the "Reports" screen will be displayed.



In the "Reports" screen find the report "Custom Guest Report" and click on the Ok button.

Report Name	REP Name
Custom Reporte Huespedes	custom_reporte_huespedes

The "Report Parameters" screen will be displayed and click on the "Preview" button.

**Custom Reporte Huespedes**

Preview Print File Close

The customized report will be displayed





Reporte huéspedes en propiedad

Room	Name	Company	Resv Status	Arrival	Departure
0204	Leo Xuna	EXPEDIA.COM	CHECKED IN	20-MAY-19	21-MAY-19
0204	Sun Danding	EXPEDIA.COM	CHECKED IN	20-MAY-19	21-MAY-19
0212	Hans Aydin Fejido	OXFORD BUSINESS GROUP-FZ-LLC	CHECKED IN	18-MAY-19	20-MAY-19
0214	Rebecca Noelle van Hove	CELEGO S.A.	CHECKED IN	19-MAY-19	22-MAY-19
0218	Jianjie Ye	LAMA EVENTOS E VIAGENS LTDA	CHECKED IN	14-MAY-19	20-MAY-19
0218	Lin Weilin	LAMA EVENTOS E VIAGENS LTDA	CHECKED IN	14-MAY-19	20-MAY-19
0222	Rivara Gilberto Gonzalez Embry	CLINICA DAN FELIPE S.A.	CHECKED IN	19-MAY-19	24-MAY-19
0302	Gilwan Pereira Cardoso	HAR MAJESTIC CONSTRUCTOR DE CUENOS	CHECKED IN	18-MAY-19	20-MAY-19
0302	Celsa Carló Castro Martín Ribetto Cardoso	HAR MAJESTIC CONSTRUCTOR DE CUENOS	CHECKED IN	18-MAY-19	20-MAY-19
0310	Guillermo Leon	SUN CHEMICAL	CHECKED IN	19-MAY-19	23-MAY-19