

STANDARD
OPERATING
PROCEDURES

Front Office



More Reservations. Happier Guests.™

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Legal disclaimer

The SOP templates provided by Cloudbeds in this eBook is for general informational purposes only. Here we are sharing our hospitality knowledge and experience but we make no representation or warranty of any kind regarding the accuracy and completeness of this information. Please kindly use it as general recommendations and references. It is the responsibility of the property to adapt it to fit its business reality and needs.

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Introduction

Any successful hotel or vacation rental utilizes numerous processes in order to operate effectively and efficiently. To ensure all processes are aligned and delivered consistently, all staff members should be familiar with the property's standard operating procedures. In the hospitality industry, well-defined SOPs help deliver the best guest experience, ensure service and safety standards, lower costs, reduce errors, and provide faster employee onboarding.

Standard Operating Procedures (SOPs) are written step-by-step guides on how to perform routine or repetitive activities in the workplace.

Here, at Cloudbeds, we understand that independent properties may not have the time or necessary sources to create their own SOPs. That's why we have put together our hospitality expertise to create this ebook. This tool is to help you document procedures for your hotel processes typically performed by the Front Office team.



How to use this eBook

This ebook is divided into several parts, with each section covering each of the housekeeping processes.

- The “**Purpose**” section briefly describes the process and explains its importance.
- The “**Procedure**” section will outline the suggested procedures for each section. Please review each of these sections individually and edit them to reflect your property’s procedure.
- The last section entitled “**Tips**” contains additional suggestions on how to improve the process and COVID-19 recommendations to help to adjust to the current business reality.

We are covering several Front Office areas which will be a good starting point to document your own SOPs. Still, we encourage you not to limit your documentation to the mentioned procedures and to add all existing processes to these recommended SOPs. Cloudbeds will be sharing more SOPs for Front Office and other departments soon, so stay tuned for more updates.

TIP

Throughout the eBook, you will find links to the SOP templates with the procedures covered here. To edit these templates, make a copy of the doc and then customize the process to fit your business needs. While customizing, be sure to upload your logo to brand your new SOPs.



Get the SOP Templates

FEEDBACK

If you have a few minutes, we would greatly appreciate your feedback which will help us improve and expand our SOP library.



Share Your Feedback

RESERVATIONS

INTRODUCTION

Managing reservations is one of the most important responsibilities of the Front Office department. Whether it is a walk-in, a phone call, an OTA booking, or a big group reservation - the Front Office should focus on accommodating the clients needs and desires, all whilst following hotel procedures.

How to handle a direct reservation? What to do with reservation enquiries for sold-out dates? What's the different procedures for tentative and guaranteed reservations? How to modify reservations and manage cancellation requests? What is the procedure for handling overbookings? Your Front Office team needs to know everything related to the reservation sources, reservation types, and reservation options in order to be able to deliver consistent customer service.

Front Office SOP Templates Available

Download, customize and print your own SOPs to fit your property.



[Get the SOP Templates](#)

01 Direct Reservations (Walk-ins, Emails and Phone Calls)

PURPOSE

The hospitality experience of every guest starts with the interaction with your hotel staff when the guest is making a reservation. Many guests go to trusted OTAs to look for hotels, but some would check out hotel websites, follow a friend's recommendation, or just drive/walk around to find a room in the area. While OTA reservation sources are important and can be a big part of the business, direct reservations are a great opportunity to gain guests' loyalty and trust while providing your business the opportunity to earn commission-free revenue.

While Cloudbeds booking engine makes it possible to accept online reservations on your website or even on social media sites (Twitter, Instagram, and Facebook), the traditional direct reservation sources are still Walk-in, Email, and Phone.

Handling a direct reservation request is the hotel's opportunity to create a positive first impression. It is important to collect all the required information and try to follow all of the guest's preferences. Usually, the properties ask for credit card details or/and a deposit to confirm the reservation.



Procedure for Walk-ins

1. Greet the guest. If you have a line of guests, make sure to greet them as they enter the lobby and let them know that you will assist them as soon as you are finished with the other guests. Make them feel welcome with a warm greeting and ask how you can assist.
2. Listen to the inquiry. Ask for the guest's name. If necessary, ask for the additional information regarding the stay dates, amount of adults/children, and the purpose of the stay. Even if your system does not have a record of the guest, it is important to ask the guest whether they have stayed here before, as they may have stayed under a different name.
3. Check for the availability in your PMS system.
 - *In Cloudbeds, you can do so by looking at the [calendar](#) (ensure that there are no unassigned reservations that are not shown on the calendar) or by [creating a new reservation](#).*
4. Inform the guest about the available rooms for the requested dates and about the restrictions if any (e.g. minimum stay of 2 nights is required) and inform them of any rate plans for similar priced amenities.
5. If it is not a repeat guest, give a brief introduction to your property. Offer to take the guest on a tour of the hotel facilities and the available rooms if possible.
6. Inform the guest about additional products and services offered by the hotel (e.g. complimentary breakfast, parking, meals, transportation, tours, and trips, etc). Refer to the section on [Upselling Additional Services and Products](#) for more information.
7. Create a new reservation in your PMS system and ask for the remaining obligatory details like name, phone, email, address, and country. Add additional charges and special remarks to the reservation if necessary.
 - *In Cloudbeds, it is easy to [create a new reservation](#), [add additional items](#) to the reservation folio and special remarks into the [reservation notes](#).*
8. Repeat all the reservation details to the guest to confirm and ensure all details are correct.

9. If the guest is checking-in straight away, print the registration card and request the guest complete card to collect all the remaining details and proceed with the check-in process. Refer to Guest Registration and Check-In for more information.
 - *In Cloudbeds, you can [print a registration card](#) directly from the reservation or take advantage of one of the [pre-check-in apps Cloudbeds integrates with](#).*
10. Disclose your deposit and cancellation policy and ensure that the guest is in agreement. Collect credit card details or an advanced deposit to guarantee the reservation. Provide the guest with the invoice and send out the confirmation email. Refer to the sections [Handling Payments](#) and [Guest Invoicing](#) for more information.
11. Thank the guest for the reservation and ask if you can do anything else for them.

Procedure for Phone Calls

1. Answer the phone within 3 rings. If you are attending a guest at the counter please notify the guest on the phone that you are currently assisting a customer at the counter, and ask them if they are ok with a brief hold while so you can complete your interaction with the guest on-site.
2. Greet the guest. Mention the name of the hotel, your name, and position. Ask how you can assist.
3. Listen to the inquiry. Ask for the guest's name. If necessary, ask for the additional information regarding the stay dates, amount of adults/children, and the purpose of the stay. Even if your system does not have the guest as a previous guest, it is important to ask the guest whether they have stayed there before, as they may have stayed under a different name.
4. Check for the availability in your PMS system.
5. Inform the guest about the available rooms for the requested dates and about the restrictions if any (e.g. minimum stay of 2 nights is required) and inform them of any rate plans for similar priced amenities.
6. If it is not a repeat guest, give a brief introduction to your property. Explain the difference between available rooms and ask for the preference.

7. Inform the guest about additional products and services offered by the hotel (e.g. complimentary breakfast, parking, meals, transportation, tours, and trips, etc). Refer to the section on [Upselling Additional Services and Products](#) for more information.
8. Create a new reservation in your PMS system and ask for the remaining obligatory details like name, phone, email, address, and country. Add additional charges and special remarks to the reservation if necessary.
9. Repeat all the reservation details to the guest to confirm and ensure all details are correct. Make sure everything is correct.
10. Disclose Explain about your deposit and cancellation policy and ensure that the guest is in agreement. Collect credit card details or an advanced deposit to guarantee the reservation. Send out the confirmation email and payment invoice if any. Refer to the sections [Handling Payments](#) and [Guest Invoicing](#) for more information.
11. Thank the guest for the reservation and ask whether you can do anything else for them.

TEMPLATES

→ Answering the Phone Checklist

Get the Template

→ Phone Conversation Template

Get the Template

Procedure for Emails

1. Analyze the email and check for the availability in your PMS system.
2. Reply back thanking the guest for the inquiry or if a contact number was included in the email, you may try to call the guest.
3. Inform the guest about the available rooms for the requested dates and about the restrictions if any (e.g. minimum stay of 2 nights is required). Explain the difference between available rooms and ask for the preference. Inform the guest of any promotions or rate plans if there are any available for the exact dates of stay or similar dates.
4. Inform each inquiry about additional products and services offered by the hotel (e.g. complimentary breakfast, meals, transportation, tours, and trips, etc). Refer the guest to your website for more information. Refer to [Upselling Additional Services and Products](#) for more information.
5. Explain your cancellation and deposit policy in order to guarantee the booking. It is recommended to ask the guest if they understand the policy or at minimum inform them they can call directly to discuss the policy if they have questions.
6. Add the link to your booking engine so the guest can make a reservation online if preferred and include a short description so they know they can use the link for a commission free booking without incurring any additional charges.
7. Thank the guest for the reservation inquiry.
8. Once you get all the details, a new reservation in your PMS system and ask for the remaining obligatory details like name, phone, email, address, and country. Add additional charges and special remarks to the reservation if necessary.
9. If you don't hear back from the guest within 2 business days, check your PMS account to see whether he has made a reservation online. If not, send a quick follow up or call if the guest included their contact number with the purpose of asking whether he would still like to make a reservation and whether you can assist with anything else.

TEMPLATES

→ [Email Template for Direct Reservation Inquiry](#)

[Get the Template](#)

- If the reservation is for multiple rooms, manually assign the rooms to make sure all the guests are staying close to each other instead of utilizing the auto-assign feature.
- Make a note of any special occasion and purpose of the stay (anniversary, birthday celebration, etc). This will help to customize the check-in process and allow the opportunity to suggest additional products to make the guest’s stay memorable.
- *In Cloudbeds, if you don’t have a continuous availability for the requested dates, you can offer the guest to [make a split reservation](#) and to stay in different rooms.*

		OCT 2020							
		MON 5	TUE 6	WED 7	THU 8	FRI 9	SAT 10	SUN 11	MON 12
		0 2,94%	0 5,88%	0 2,94%	0 5,88%	0 11,76%	0 11,76%	0 2,94%	0 8,00%
▼ All Room Types		1 \$ 90,00	0 \$ 90,00	1 \$ 90,00	0 \$ 90,00	0 \$ 100,00	0 \$ 100,00	1 \$ 100,00	2 \$ 0,00
▼ Standard Single									
🔍 101	*	John Black			+ John S...	+ Shower replacement			
🔍 201	*		Olga Anderson			+ John Smith			

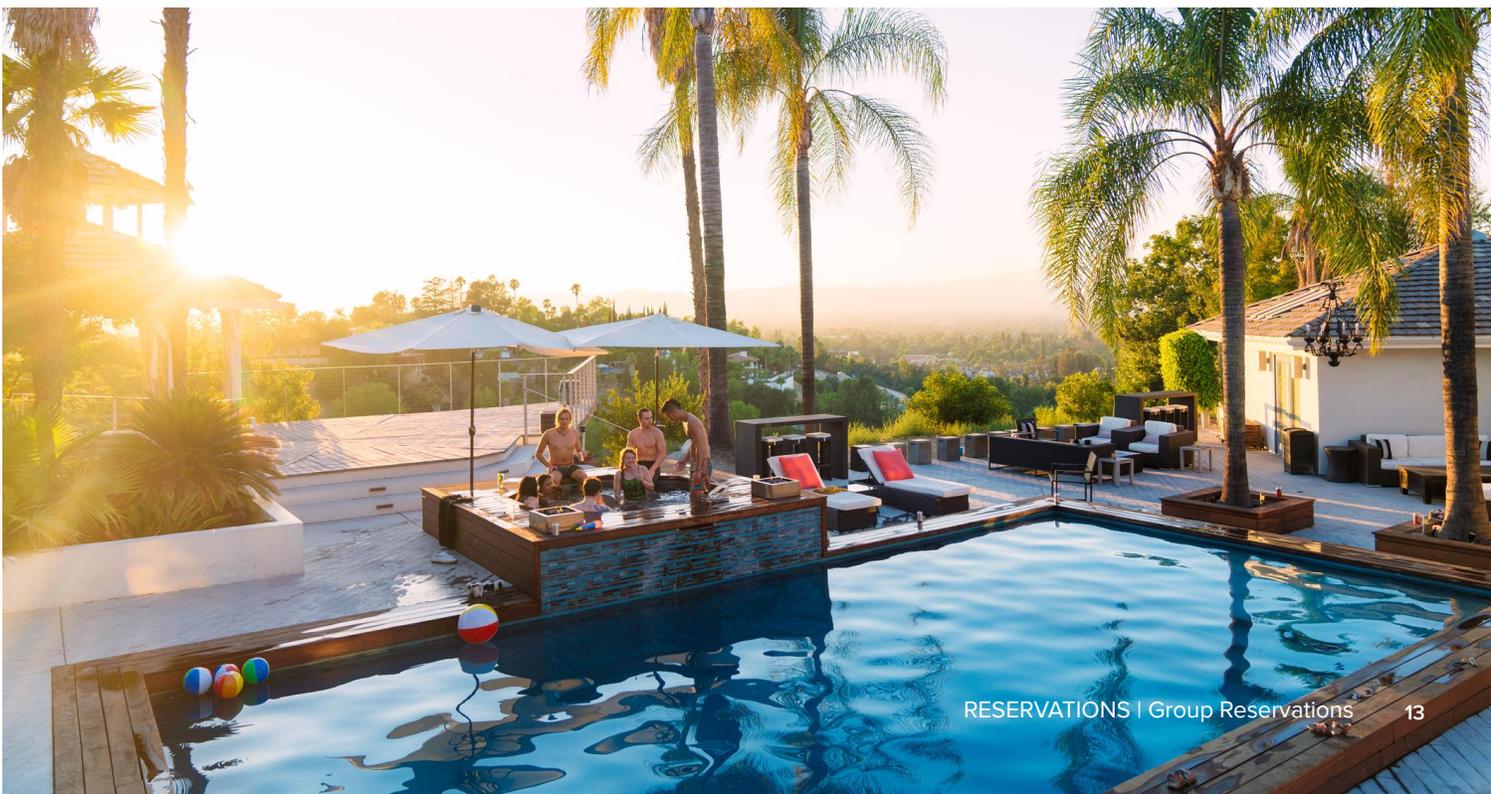
- *In Cloudbeds, you can specify deposit and cancellation policies. This information will appear on your booking engine. The [suggested deposit](#) will also be specified when creating a reservation.*
- *In Cloudbeds, you can send [a customized link](#) to redirect your guest to a particular room type, rate plans, and stay dates.*
- Apart from direct reservation inquiry email template, it is recommended to create other standard pre-stay and post-stay email templates including but not limited to:
 - [Welcome Back Promos](#) (find more information here about creating “[Loyalty Programs](#)”)
 - Request a quest review on Tripadvisor, Booking, Expedia etc.
 - Friendly ‘Thank you for your stay’ email

02 Group Reservations

PURPOSE

While handling small group reservations is still a feasible task for independent property owners, hosting large groups can sometimes be a double-edged sword. On the one hand, hosting recurring group business brought in by travel agents or corporate groups can create consistent and predictable revenue. On the other hand, making all the arrangements, managing large group check-in/check-out, and splitting billing invoices and commission payouts can be quite complicated.

To manage a group reservation inquiry successfully, means to be able to quickly set aside the needed inventory, offer a special rate plan or a package, to link all the reservations under one group profile, and to make adjustments in the inventory if needed. For example, Cloudbeds Groups Module is incredibly useful for groups, taking the stress out of these operational tasks. Groups Module provides the opportunity to grow and manage group business/ contracted corporate business from within Cloudbeds.



Group Reservation Types

Handling a group reservation inquiry depends on the type of reservation and the purpose of the stay. In some instances creating one reservation with multiple rooms and assigning the rooms close to each other may suffice. In other cases, such as a wedding or corporate event in which one party is responsible for the entire group, this strategy may not be efficient or practical. Before customizing this SOP for your business, it is worth reviewing different group reservations types to decide which ones suit your market, location, property type, and facilities.

- **Business Trips and Conferences.** A company often sends employees to another city and has made a special agreement with a local property. An employee can create a reservation at this hotel. The company covers all room costs, but the employee is responsible for all the extra costs.
- **Travel Agents and Wholesalers.** A travel agent resells rooms at the property at a markup price. He sends guests to the property frequently, so he gets 2 guaranteed rooms every day. The travel agent is responsible for paying for these rooms regardless of whether there is a reservation or not unless he releases the blocked allotment a minimum of 7 days ahead of time.
- **Weddings.** The bride and groom will cover the cost of their guests. These guests will need a way to create their own reservations (typically by either navigating to a URL or calling the property with a group ID or group name). Each reservation could likewise have its own arrival and departure dates (not all of them will stay and leave on the same date). Since the wedding party is reserving 20 rooms, they may be eligible for a discount. Therefore each guest will need to indicate that they belong to this group in order to receive a special rate. They will also need a location for the ceremony and catering service.
- **Celebrations and Parties.** A company needs a location for a New Year's Eve party. They reserve the needed amount of rooms and the restaurant for a night. The availability is blocked before any reservations are added.
- **School and Field Trips.** A group of students is traveling to another country as a part of a study project. They need to stay together on the same floor or at the neighboring properties. There's a person responsible for the organization of the trip and costs. This person will be paying for the stay of the whole group.
- **Families and Friends.** A big group of friends or several families are traveling together. They need to stay together but everyone will pay separately.

Procedure

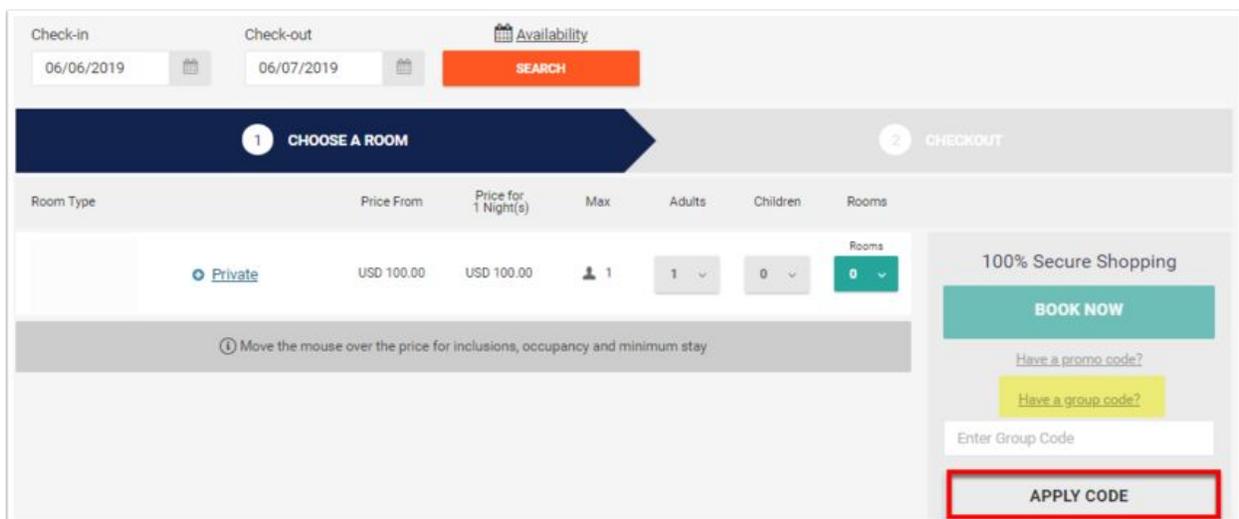
1. Greet the guest and ask how you can assist. Listen to the inquiry. Ask for the guest's name. If necessary, ask for the additional information on the stay dates, amount of guests, and purpose of the stay. Ask the guest if the group's organization/ representative has stayed at the property before.
2. Check for the availability in your PMS system.
 - *In Cloudbeds, you can do so by looking at the [calendar](#) (ensure that there are no unassigned reservations that are not shown on the calendar) or by [creating a new reservation](#).*
3. Inform the guest about the available rooms for the requested dates. If it's not a repeated guest, give a brief introduction to your property and facilities. Explain the difference between the available rooms. If applicable, make an appointment with the guest so they can come over to get a tour of the property and to discuss the details of the event (e.g. wedding, celebration, conference, etc).
4. Inform the group's representative about additional products and services offered by the hotel that would be suitable for the event or for the group.
5. If it is an organized trip with one representative, you can consider creating a new reservation with multiple rooms in your PMS system.
 - *In Cloudbeds, it is easy to [create a new reservation](#), [add additional items](#) to the reservation folio and special remarks into the [reservation notes](#).*
6. Otherwise, create a group profile in your PMS system if it supports a group functionality.
 - *In Cloudbeds, [create a group profile](#) (the master profile under which certain groups of reservations are created or added). [Add a contact person](#) to the profile. At this point, you can create [an allotment block](#) to reserve the needed availability for the group at special or base price. It is possible to block availability for the number of rooms agreed upon or to have a special group rate without blocking availability.*

The screenshot shows the Cloudbeds PMS interface for 'Group Profiles'. The navigation bar includes 'Dashboard', 'Calendar', 'Reservations', 'Groups' (selected), 'House Account', 'Rates and Availability', 'Guests', and 'Reports'. A search bar and 'Get Help' link are also visible. Below the navigation bar, there is a 'FILTER' dropdown and a '+ CREATE GROUP PROFILE' button. The main content area displays a table with one entry:

CODE	NAME	TYPES	EARLIEST CHECKIN AT	LATEST CHECKOUT AT	STATUS	
g828245	Smith Wedding	Group			Open	

Below the table, there are two buttons: 'Remove Profile' and 'Edit'.

7. Add additional products or services to the group folio if any and mention all the special remarks in the group profile notes. Examples of additional services and products may include one or more of the following: conference hall rental, restaurant reservations and catering, event coordinator service, transportation, guided trips and tours, etc.
8. Repeat all the reservation details to the guest to confirm, ensuring everything is correct.
9. Clearly outline your deposit and cancellation policy. Collect credit card details or an advanced deposit to guarantee the reservation. Send out the confirmation email and payment invoice if applicable. Refer to [Handling Payments](#) and [Guest Invoicing](#) for more information.
10. Instruct the guest on how to make reservations under their group profile in your PMS system.
 - *Using the newly created Group Profile in the Cloudbeds' Group Module, [create a unique URL for each allotment block](#) to allow each group member to book the allocated rooms online directly from the booking engine. Share the generated URL with a group of guests, travel agent, or a wholesaler. Any reservation made using this link will be automatically booked within the group profile/allotment block. Alternatively, you can create new reservations manually and [link them to the group profile/allotment block](#).*
11. Thank the guest for the reservation and ask if you can do anything else for them before hanging up.



- If big group events and conferences are typical for your property, consider assigning a dedicated person to manage group reservations. It can be somebody from the sales team or a special group reservation coordinator.
- While handling a group reservation request, make sure you've got a pen and paper on hand. Listen carefully and take notes of all the information and remarks. Try to get everything from the first time without making the guest repeat the information. You may consider creating special group reservation request templates.
- Instead of a request template, you can use a special *Group Contract* signed by both parties where all the details and conditions will be specified, including cancellation and deposit policies, group allotments, additional services, etc.
- Make sure the room assignment is functional for the group reservations. Most of the groups would like to stay in the rooms close to each other.

TEMPLATES

→ [Group Contract Template](#)

[Get the Template](#)

03 Reservation Enquiries for Sold-Out Dates

PURPOSE

The goal of every hotel or vacation rental is to sell out every night. Still, simply refusing booking requests for sold-out dates can take away some future business opportunities. A front desk team member should make a positive impression by giving the reason the property does not have availability and offer alternatives, perhaps at a discount. You may also choose to gather the potential customers' information for a waiting list in case of a cancellation. This data can be used not only to fill cancellations but for email marketing. Additionally, it is recommended to partner with a local hotel in which you can send overbookings and/or refer customers when your property is at full capacity in order to increase revenue by commission fees.



Procedure

1. Explain to the guest that the hotel or the specific room type which they have requested is fully booked. Provide a brief explanation for it.
2. If availability is blocked by restrictions or blocks:
 - Check your base rate configuration for the [Length of Stay restrictions](#) or Closed to Arrival restriction. They may block availability on the requested dates. If possible, consider adjusting the restrictions and letting the guest make the reservation.
3. If the requested room type is sold out:
 - Offer other rooms available on the requested period. Explain the difference between the room types. Try to upsell a higher room category if possible.
 - If it is a special status guest (belongs to a group profile or to a loyalty program), consider offering a free upgrade. Ensure your offer is in line with the hotel policy.
4. If the hotel is sold out:
 - Ask the guest if he would like to change the dates of the reservation to an alternative date. Offer alternative available dates.
 - Recommend to stay at a partner hotel in the city with the same level of pricing and service. Arrange for a reservation in a partner hotel if the guest agrees with this offer and confirm with the guest once the reservation is made.
 - Ask the guest if you can waitlist their reservation in case of a cancellation or modification.
5. Write down the guest's name, phone number, email address, requested arrival and departure dates, and room type requested by the guest. Repeat all the details to the guest to confirm and ensure everything is correct.
6. Ask if the guest would like to receive newsletters with special offers via email.
7. Thank the guest for the details provided and ask if you can do anything else for them before hanging up.

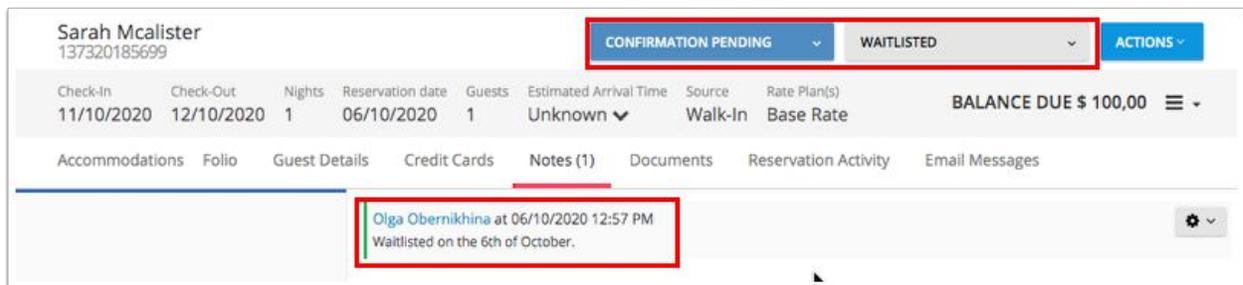
Waitlisting the Guest

Option A: Waitlisting the Guest in the PMS

Check if your PMS system offers a solution or a feature for waitlisting guests.

For example, in Cloudbeds, you can use the Quick Import Tool to add a tentative reservation to the system for sold-out dates as a workaround:

- Import the reservation with the status “Confirmation Pending”.
- Add a reservation note “Waitlisted on [date]” and any additional remarks.
- [Create a guest status](#) “Waitlisted” and assign it to the guest profile. Add the same note to the guest profile.
- This reservation will show up as overbooked in the system. Keep in mind it is tentative and other staff will be able to identify it as tentative by the notes and the reservation status.
- When the availability is released by a cancellation or a modification, the waitlisted tentative reservation will block it. Since the waitlisted guest is blocking availability, you should contact the guest to confirm the reservation as soon as possible. If the guest does not confirm, remove the reservation or mark as canceled in order to open availability to the OTAs and for direct bookings.
- Monitor all of the modifications and cancellations daily to know when the availability gets released to fit one of the waitlisted reservations.



Option B: Maintaining Waitlisting List

Register the request on a separate waiting list. You can have this report as a separate Excel file or in Google sheets. Alternatively, you can use a printout of the template:

Room type	# of rooms	Arrival	Departure	Guest name	Phone	Email	Request date	Notes

- By working with a waiting list or adding a waitlisted reservation as Confirmation Pending to Cloudbeds you can keep track of your waitlisted guests. It is not recommended to waitlist a guest twice. In other words, a guest whose reservation was refused in the past should be prioritized next time.
- Contacts of waitlisted or transferred guests can be added to your marketing list. Just make sure you follow [GDPR and data privacy commitments](#) in your country and you get the guest's agreement before passing their contact information to marketing.
- Establish partnerships and agreements with local hotels that offer comparable quality, guest experience, and location. Many hotels will offer each other discounts and commissions for referring reservations or walking overbooked guests. If your hotel has sister hotels or apartments (managed or owned by the same owner/parent company), forwarding reservations to them should be a priority.
- Consider using an overbooking strategy to sell more rooms/beds than available with the purpose to maximize occupancy and revenue by anticipating future cancellations and modifications. Keep in mind that overbooking decisions should be based on a comprehensive analysis of historical data.

04 Tentative Reservations

PURPOSE

Most of the hotels and property owners secure their reservations by charging an advanced deposit or by collecting credit card details to create a temporary authorization. However, at times a guest may make a booking request and confirm it later. This is referred to as a 'tentative reservation'. A tentative reservation is a pending booking request made by a guest for specific stay dates. The hotel holds the room until the cut off date and time, by which the guest should confirm their stay.

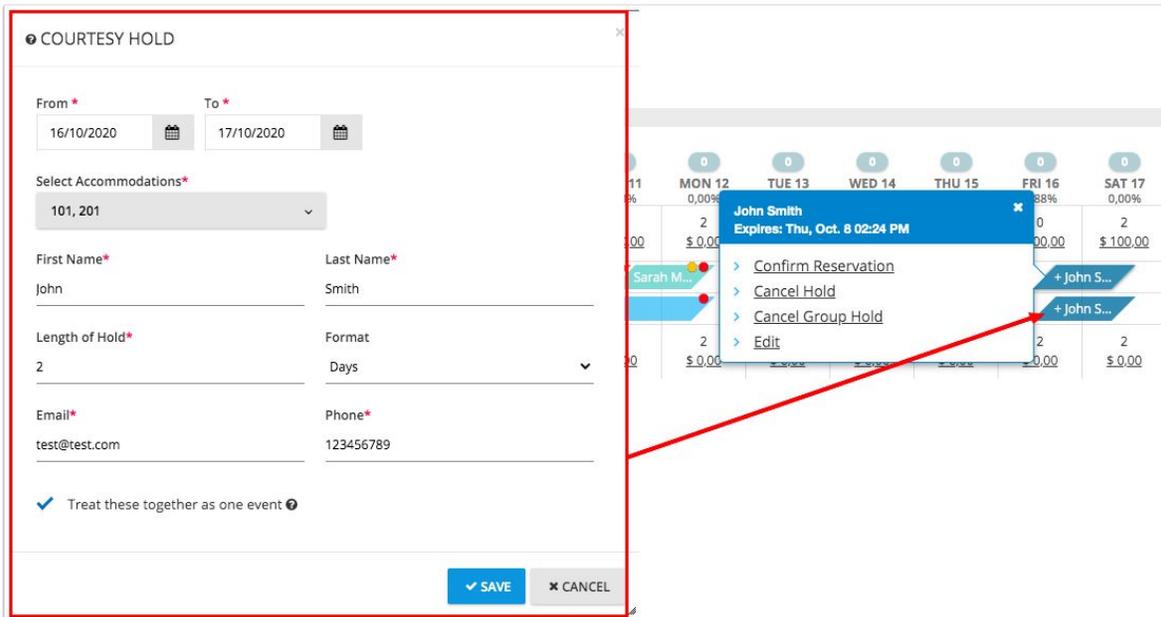
Once the reservation is confirmed, the hotel blocks the room and sends a booking confirmation to the guest. A reservation can be guaranteed or non-guaranteed. A guaranteed reservation means that the hotel will hold the room even if the guest does not arrive on time. A reservation can be guaranteed by advanced payment.

Alternatively, the hotel can use contractual agreements or allotment agreements when working with travel agents, companies, or other groups for tentative reservations. For example, allotments can be purchased for a specific period of time such as a whole season, part of a season or for any single dates and then resold to travel partners and final customers around the globe. A couple of days prior to carrier departure/hotel any unsold seats/rooms may be released back to the supplier if such an agreement exists between the two parties. An allotment release back period is also negotiated as part of the allotment contract (e.g. four days prior to check-in/departure).

The hotel should define and document its courtesy hold, deposit, and cancellation policies. The front desk team should handle tentative reservation requests and non-guaranteed bookings following the existing hotel policies.

Procedure

1. Inform the guest about the standard reservation holding time and the release period as per the hotel policy.
2. Write down the guest's name, phone number, email address, requested arrival and departure dates, and room type requested by the guest. Repeat all the details to the guest to confirm. Make sure everything is correct.
3. Create a courtesy hold in your PMS system.
 - In Cloudbeds, it is possible to [create a courtesy hold](#) for a specified period of time and transform it into a reservation later.



4. If the guest confirms the reservation later, confirm the hold in your PMS system.
5. Explain your policy for non-guaranteed bookings. Non-guaranteed bookings should be marked as 'Confirmation Pending'.
6. Provide several options on how to guarantee the booking. Explain about your deposit and cancellation policy.
 - Once they confirm, collect credit card details or an advanced deposit to guarantee the reservation. Provide the guest with the invoice and send out the confirmation email. Once a deposit or payment is made, change the status to confirmed. Refer to [Handling Payments](#) for more information.
7. Thank the guest for the reservation and ask if you can do anything else for them.

Courtesy Holds Policy

The courtesy holds policy should be clearly explained to the guests during direct reservation inquiry. [Courtesy holds created in Cloudbeds](#) will be automatically deleted if not confirmed within the configured period of time. The length of the hold can be configured in days or in hours.

- Courtesy holds for the future dates from ___ days from now should be confirmed within ___ days.
- Courtesy holds for the same day or for the following ___ days should be confirmed within ___ hours.

Non-guaranteed Bookings Policy

Non-guaranteed reservations can be added to the PMS system following a regular booking procedure and canceled after a certain period if the guest does not send a deposit payment. If the hotel accepts non-guaranteed bookings, these policies should be explained to the guest and communicated on the third-party channels.

- Non-guaranteed reservations with 'Confirmation Pending' status should be paid within [NUMBER OF] days. Otherwise, they will be canceled.
- Non-guaranteed reservations with no arrival time and no re-confirmation from the guest are canceled at [TIME] on the day of arrival to release the availability for last-minute reservations and walk-ins.
- Non-guaranteed reservations with specified arrival time and confirmation from the guest are canceled [NUMBER OF] hour(s) after the specified arrival time on the day of arrival.

Deposit Policy

The hotel deposit policy for guaranteed bookings should be clearly communicated to the guests in the case of direct reservation inquiries. As for third-party reservation sources, it should be communicated by the third-party or configured on the channel. Additionally, the deposit policy can be mentioned in the pending confirmation email.

As for Cloudbeds booking engine, it is possible to collect credit card details online and automatically charge them through a connected payment gateway. Alternatively, booking engine reservations can come in as 'Confirmation Pending' and the guest can be instructed by email on how to transfer the deposit. You can also offer several payment options, including Paypal or bank transfer. You can easily edit Refer to [Handling Payments](#) for more information.

[The deposit set up in Cloudbeds](#) can be used for all reservations in Cloudbeds' booking engine and also used when creating reservations manually:

- No deposit
- First room night
- Percentage _____
- Fixed _____

Apply taxes on top of the deposit? Yes / No

Policies [Learn to Use](#)

Use the options below to define the terms and conditions for which you will accept reservations. These are the terms that will be a legally binding obligation between you and the guest in order to guarantee a room stay at your property. A guest must accept your terms when they complete the reservation checkout process and you must provide the services under the terms that you have offered them through your website.

Deposit Cancellation Policy Terms & Conditions Arrival & Departure

What deposit amount do you want to charge the guests?

Percentage Fixed Amount First Day Price ⓘ Do not collect deposit payment at the time of booking

What deposit (%) of the total do you require to secure a reservation?*

50 %

Require the full payment amount of the reservation to be collected prior to check-in ⓘ

Include taxes and fees specified as part of the deposit ⓘ

Cancellation Policy

The hotel cancellation policy for guaranteed bookings should be clearly communicated to the guests. It should be explained verbally to the guests in the case of direct reservation inquiries. For online reservations, it should be stated on the website. As for third-party reservation sources, it should be communicated by the third-party or configured on the channel. Additionally, the cancellation policy should be mentioned in the confirmation email.

In Cloudbeds, the [confirmation email with cancellation policy](#) is configured for direct reservations and for the booking engine. It can be also included in [email templates](#) sent from Cloudbeds. Please note that the information will not be sent to the connected channels.

The cancellation policy can be standardized or customized:

- No charge if canceled within ___ days of arrival
- Partial charge of First Night Stay / ___% of Deposit / ___% of Full Stay if canceled within ___ days of arrival
- The full charge of Full of Deposit / Full Stay if canceled within ___ days of arrival

05 Modifying Reservations

PURPOSE

Handling the guest's needs professionally and with care is essential to creating a positive guest experience. As a general rule, the front desk team should do its best to accommodate all of the requests and modifications while ensuring the request/modification is in-line with the company policies.



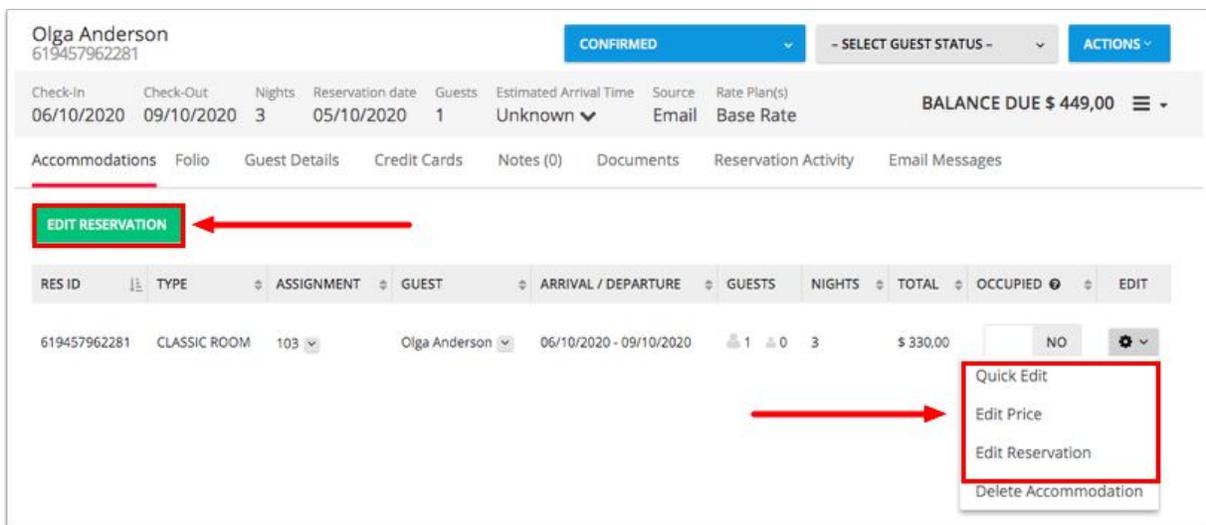
Procedure

1. Ask for the guest's name and/or reservation ID.
2. Locate the reservation in the PMS system by searching by the name or the reservation ID. Confirm that this is the right reservation by double-checking the stay dates, room type, reservation source, and other guest details.
3. Determine the changes that need to be made (e.g. the guest may need to change the dates of the stay, the room type, the number of rooms, the number of guests, or add additional services).
4. If the reservation was originally booked on the channel, kindly explain to the guest that they should modify it directly with the channel.
5. If you are talking with the guest on the phone, ask if you can put them on hold while you are checking the availability if needed.
6. Check for the availability. You can do so by looking at the calendar (make sure that there are no unassigned reservations that don't show up on the calendar) or by attempting to modify the reservation.
7. If the guest had booked the original reservation on a rate plan or special package, check the availability of these special rates and packages.
8. Inform the guest about all changes in rates and deposit policy if any.
9. If the needed change cannot be accommodated, apologize and provide a brief explanation for it. Offer alternative options:
 - Suggest placing an extra bed(s) in the booked room.
 - Suggest splitting a reservation.
 - Offer other rooms available on the requested period. Explain the difference between the room types. Try to upsell a higher room category if possible.
 - If it is a special status guest (belongs to a group profile or to a loyalty program), consider offering a free upgrade. Make sure it is in-line with the hotel policy before doing so.
10. Repeat new reservation details to the guest to confirm, ensuring everything is correct.

11. Make the needed amendments in your PMS.

In Cloudbeds, you may do that by:

- *Dragging and dropping the reservation on the calendar*
- [Splitting the reservation](#) in the Calendar or in the Reservation tab
- Using the quick edit or edit reservation option to [change the stay dates](#), room type or room quantity
- Using edit reservation option to add new accommodations
- [Adding new guests or editing the main guest](#)



12. Take a new valid payment method for the new stay details if needed. Refer to [Handling Payments](#) for more information.
13. Add any special remarks or comments to the reservation notes.
14. Send a new confirmation letter to the guest via email.
15. Thank the guest for the details provided and ask if you can do anything else for them.

- Reservations received through all the channels should be modified inside of the OTA's extranet first, and then inside the PMS. In Cloudbeds, if the channel is connected through API, the modification will be forwarded to the system. The original reservation will get updated automatically if the OTA reservation ID and source match.
- *In Cloudbeds, you can use [email notifications](#) to keep track of modifications received through OTAs.*
- The option to edit past reservations is automatically disabled in Cloudbeds. But it is possible to add the needed amendments by temporarily changing the status to Confirmed or Confirmation Pending.

06 Cancellation Requests

PURPOSE

Cancellation and deposit policies should be clearly documented and communicated to the guests and the front desk team. A front team member should handle cancellation requests with care and abide by the established hotel policies. Handling cancellation requests involves working with payments and editing the reservations in the system.



Procedure

1. Ask for the guest's name and/or reservation ID.
2. Locate the reservation in the PMS by searching by the name or the reservation ID. Confirm that this is the right reservation by double-checking the stay dates, room type, reservation source, and other details with the guest.
3. Ask the guest if they would like to make another reservation.
4. Kindly ask for the reason for canceling.
5. If the reservation was originally booked on the channel, kindly explain to the guest that he should cancel the reservation directly on the channel. Normally, the integration does not forward cancellations from the PMS system to the channels.
 - *The same applies to Cloudbeds. However, if it is a direct reservation or a Hostelworld, Coliving, or Tripadvisor Instant Booking reservation, it can be canceled in Cloudbeds.*
6. Check the cancellation and deposit policies. Explain it to the guest.
 - If it is a guaranteed booking, it should be canceled for free within a particular amount of days before arrival. Otherwise, charges apply.
 - Non-guaranteed bookings do not have any cancellation charges.
7. In the event that the guest does incur a cancellation fee, add the needed charge to the reservation folio in the PMS.
 - *If you are using Cloudbeds, you should [add a cancellation fee as a manual room revenue](#) to the reservations folio.*

Olga Anderson
619457962281

CANCELLED - SELECT GUEST STATUS - ACTIONS

Cancellation #	Cancellation fee	Check-In	Check-Out	Nights	Reservation date	Guests	Source	Rate Plan(s)	BALANCE DUE
45415903278	\$ 0,00	06/10/2020	09/10/2020	3	05/10/2020	1	Email	Base Rate	\$ 499,00

Accommodations **Folio** Guest Details Credit Cards Notes (0) Documents Reservation Activity Email Messages

FOLIOS

Folio 1

+ ADD FOLIO

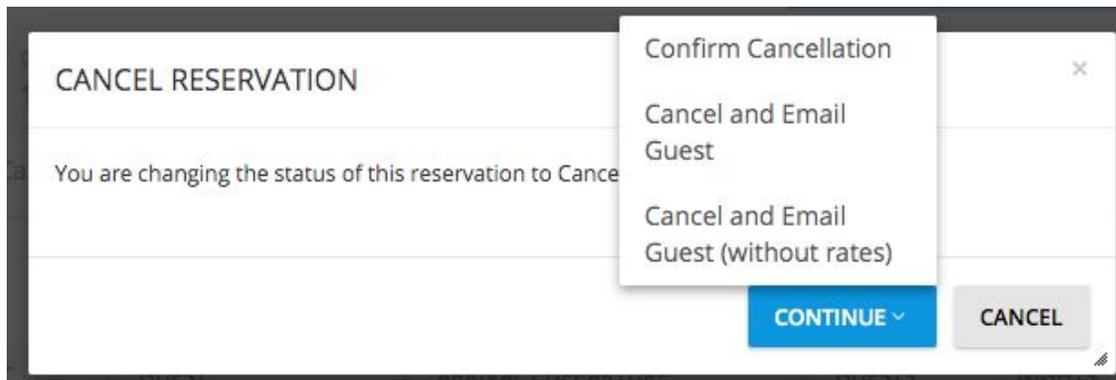
ADD / REFUND PAYMENT ADD / ADJUST CHARGE

> FILTER

RESERVATION ID	DATE/TIME	NAME	ROOM	TYPE	NOTES	QUANTITY	DEBIT	CREDIT
619457962281	06/10/2020 04:50 PM	Olga Anderson	N/A	Room Revenue - Cancellation N/A			50,00	
TOTAL							50,00	0,00

Refund Pending Transferred Transaction

8. If the guest's credit card has been charged and you need to make a refund, refer to [Handling Payments](#) for additional information.
9. Add a reservation note with the cancellation reason.
10. Change the status to 'Canceled' and send the cancellation confirmation to the guest via email.
 - *In Cloudbeds, it is possible to send a confirmation email with rates or without while canceling the reservation.*



11. Ask the guest if you can assist with anything else and thank them for the update.

- Monitor your cancellations daily. In Cloudbeds, you can use [Cancellations Report](#), [Dashboard](#), and [email notifications](#) to keep track of it.
- Reservations that are created through the OTA channels usually comply with the agreement between the hotel and that specific OTA (channel-specific cancellation/no-show process; channel-specific fees or other payments related to cancellations/modifications/no-shows). Make sure that you have correctly configured the policies on the channel.
- *In Cloudbeds, the pending room rate and tax transactions are still shown in the 'Balance Due' in 'Canceled' and 'No-Show' reservations. Although it doesn't affect revenue reports, some properties will prefer to [zero out pending charges](#) so that the staff is aware that the guest shouldn't pay since their stay has been canceled.*
- All reservations received through the channels Hostelworld/ Hostelbookers, Tripadvisor Instant Bookings, and Coliving can be canceled in Cloudbeds and the cancellation will be sent to the channel directly. Reservations received through all the other connected channels should be canceled inside of the OTA's extranet first, and then inside Cloudbeds.
- If the channel is connected through API, the cancellation will be forwarded to Cloudbeds or your PMS system. The original reservation will get updated automatically if the OTA reservation ID and source ID match.
- Consider using an overbooking strategy to sell more rooms/beds than available with the purpose to maximize occupancy and revenue by anticipating cancellations and modifications. Overbooking decisions should be based on a profound analysis of historical data.

COVID-19 TIPS

- Travelling plans have been heavily disrupted by flight cancellation, travel bans and quarantine restrictions because of the impact of the coronavirus. Additionally, many travelers just try not to risk exposure to the virus and cancel their travel plans proactively. Offering free changes or/and cancellations for a period of time helps to reassure people worried about making a reservation.
- Offering refundable or flexible rate-plans can set your property part from other properties in your area. Offering promotions such as advanced purchase discounts or additional value ads such as free breakfast may also further incentivize potential guests to stay at your property paired with the flexible cancellation policies.

07 Overbookings for Future Dates

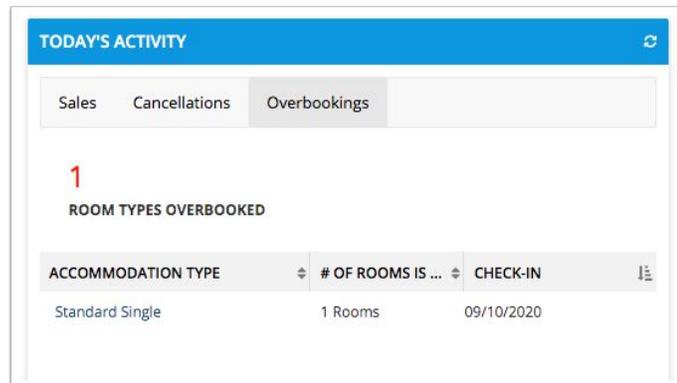
PURPOSE

Overbookings are a stressful situation for most of the hotels and above all the guests. Guests often see these situations as negative, so developing a plan to minimize the negative impacts of accidental overbookings is crucial. If a property tries to manage overbookings without a strategy, it will lead to a negative financial impact. Alternatively, having a clear procedure on how to identify and manage overbookings will lead to a positive financial impact and can help to turn a failure into a positive guest experience.



Procedure

1. Determine how many overbookings you have and figure out where they came from. Make sure there wasn't a booking mistake, duplicated reservation, or cancellation.
 - In Cloudbeds, you can easily [identify overbookings in the Dashboard section or on the Calendar](#), which will be indicated by a red negative occupancy.



The screenshot shows the 'TODAY'S ACTIVITY' dashboard with tabs for Sales, Cancellations, and Overbookings. The Overbookings tab is active, displaying a red '1' and the text 'ROOM TYPES OVERBOOKED'. Below this is a table with columns for Accommodation Type, # of Rooms, and Check-in date.

ACCOMMODATION TYPE	# OF ROOMS IS ...	CHECK-IN
Standard Single	1 Rooms	09/10/2020

2. Once you find their origin, make sure the channel is no longer open and susceptible to overbookings.
 - In Cloudbeds, you can create a [distribution closeout](#) for one of the connected channels.
3. Determine the reason for the overbooking(s). You can get in touch with your PMS support to help you to investigate the issue and to identify the cause to prevent additional overbookings from occurring. Most of the overbookings are caused by wrong settings, manual updates, manual OTA Reservation entry, or technical peculiarities.
4. Check how many cancellations you usually have for that time period. Sometimes, one or two overbookings won't matter because of future cancellations. Consider keeping the overbookings and monitoring the situation further.
5. If you have an overbooking for one of the room types, consider offering an upgrade or a downgrade to a guest and move him to another room type. Refer to [Room Allocation, Upgrade and Downgrade](#).
6. If internal relocation is not possible, create a list of local properties you can send the guest to. Make sure the properties are of similar value and quality. Perhaps, create a partnership with another property so that you can both benefit from an Emergency Overbooking Agreement in which you would send each other your overbookings to prevent negative guest experiences. This could be beneficial to both parties.

7. If you have to cancel a reservation and/or relocate a guest, define your process in detail. Some hotels may simply choose to cancel the most recent reservation but if you have premier guests or guests that frequently stay at your property, some hotels may choose to honor the reservation of their loyal/repeat guests over one-time guests. This process should be clearly defined by management and encourage employees to always consult with management in these cases when possible before making a final decision. If they are unable to reach management for guidance, they should resort to steps below to determine which reservation to cancel/reassign. There are several factors to consider when evaluating the situation to decide which guest should be reassigned/relocated and/or cancelled:
 - The source of the booking
 - Booking date
 - The duration of the stay
 - The purpose of the stay
 - Group vs. individual reservations
 - Fee agreements or penalties from third parties
 - Guests' status, reservation history (number of stays and revenue generated), and rewards program
 - If you can upgrade a return guest to a different accommodation at no additional cost to the guest, this will not only resolve the overbooking, but will also improve guest relations with preferred clients
8. Inform the third-party booking partner about the relocation, where the guest will be relocated to and what compensation to be offered if necessary. For instance, if you resolved the issue internally by upgrading the guest and the third-party will charge a penalty fee for changes to the reservation by the hotel, it may not be beneficial to your property to call the third-party. If you have to move the guest to a different property, first inform the guest about the relocation to another hotel by email or phone. Guests relocated prior to arrival are generally less frustrated and easier to recover than guests sent away at the front desk. If relocated, you would then contact the third-party reservation source to inform them of the cancellation. Please note: Many OTAs will charge a fee for cancellations made by the hotel.
9. If you offer any compensation beyond the full refund in cases of overbookings (such as discounts on future stays), document your compensation policy and make sure your front-desk team is aware of this policy and understands how and when to follow it. Some strategies to improve guest relations when an overbooking occurs may be to offer one night's stay including transportation cost to the new property. If the guest returns to your hotel after the first night for the remainder of their stay, you could offer to upgrade guests upon return or offer some other sort of compensatory action to keep the guest happy and improve the likelihood of them returning in the future.

10. In the event that a guest has a multi-night stay and you move them for one night, create a guest recovery plan. When the guest returns, this can be an opportunity to win the guest's loyalty by offering them upgrades and/or special perks during the remainder of their stay. Guest recovery plans do not have to be expensive or lavish. Simple thoughtful actions are worth far more than expensive gifts. If the guest returns to the original hotel, they're usually offered industry rate plus any available upgrades.
11. Finally, go the extra step to gain back the guest's loyalty. In some cases, when guests are relocated, they can become frustrated. Some could even leave negative reviews that will damage the hotel's reputation. To prevent these types of scenarios, go the extra mile by sending a custom follow-up and offer additional incentives if needed to make sure the overbooked guests are happy.

Guest Recovery Plan and Compensation Ideas

- Room Upgrade
- Hand-written note waiting in their room offering one or more of the following:
 - Free bottle of wine
 - Rewards points
 - Free complimentary breakfast or meal
 - Discounts or upgrades for future visits
 - Free additional products or services offered by a hotel



Possible Reasons for Overbookings

Even with the precautions that you take to prevent them, overbookings can still occur. Here are a few examples of why an overbooking may have occurred:

- Availability updated by the property.
- Channel errors such as wrong room mapping.
- Channel update speed (for example, [channels connected through ical connection](#) may take several hours to get updated and to send the bookings).
- [Simultaneous bookings](#) may occur because booking sites give their customers a 10-15 minute "window" to complete their booking. During this time, no availability changes are possible.
- Contracted availability on the channel. Meaning, the availability for certain days and rooms cannot be closed due to an agreement between the property and the channel with the channel to exclusively sell a specified number of rooms with them.
- [Room blocks or courtesy holds](#) created when there are unassigned reservations.
- Duplicated reservations, meaning one reservation has been added twice. This may occur when a modification or cancellation came in as a separate reservation and didn't update the original booking. Another possible scenario is that [3rd party reservation has been added manually](#).
- [Moving a reservation between accommodation types](#).
- [Making changes with the accommodation inventory set up](#).
- Connection issues with the channel. Most channels will plan outages for maintenance and sometimes unplanned outages occur. During outages, the PMS can not receive data from the channel which can lead to overbookings.

- Monitor new reservations, canceled reservations, and current availability on a daily basis. Analyze arrivals on a daily and weekly basis. Looking on the [Cloudbeds Dashboard](#) would be helpful here. You can run nightly [Departures reports](#), [Arrivals reports](#), and [In-house reports](#) to get a clear picture of your property. You can identify overbooking in the Dashboard section or on the Calendar, which will be indicated by a red negative occupancy.

		WED 7	THU 8	FRI 9	SAT 10	SUN 11	MON 12	TUE 13
All Room Types		0 50,00%	0 83,33%	1 105,56%	0 33,33%	0 5,56%	0 0,00%	0 0,00%
▼ Standard Single		2 \$ 90,00	1 \$ 90,00	-1 \$ 100,00	1 \$ 100,00	1 \$ 100,00	2 \$ 90,00	2 \$ 90,00
101	*	J...	+ John S...	+ John Smith				
201	*			Sarah M...				
▼ Suite		2 \$ 110,00	2 \$ 110,00	0 \$ 130,00	2 \$ 130,00	2 \$ 130,00	2 \$ 110,00	2 \$ 110,00
102	*			+ John S...				
202	*			+ John S...				

- You can set up [Cloudbeds notification preferences](#) to notify you by email each time a new reservation, cancellation or modification comes in.
- When looking at the Calendar, make sure that there are no reservations without assignment (otherwise, they will not appear on the calendar). You can [assign the reservations manually](#) or use the [auto-assign feature](#).
- Selling one room less on the OTAs or across all reservation channels can be a good strategy. This way you'll always have an extra room to fit an overbooking in. In Cloudbeds, you can change [the allotment of rooms sent to distribution channels](#) and [the allotment in the booking engine](#).
- Establish partnerships and agreements with local hotels that offer comparable quality, guest experience, and location. Many hotels will offer each other discounts in exchange for the same courtesy, so it can be beneficial for both parties to have an overbookings agreement.
- More often than not, it's going to be difficult to decide the best course of action too far in advance. If you don't know if a guest needs to move, continue to monitor the situation. It is ideal to contact the guest before they arrive, but in some cases, it won't be possible. In the event that you need to move a guest last minute, remember to show genuine care and empathy. Refer to [Overbookings During Check-In](#).

GUEST ARRIVAL & DEPARTURE

INTRODUCTION

Front Office is typically the first and the last point of contact for every guest. The Front Office team is responsible for making the guests feel welcome, providing all the necessary information for their stay, and ensuring everything is in order when the guest checks out. This includes managing offline or online guest registration, handling guest payments, sending guest invoices, allocating accommodations, providing room access, arranging early check-in or a late check-out, storing guest luggage, coordinating with Housekeeping department, and much more. The smoothness of all these processes and the professionalism of the Front Office team significantly impact the guest experience and can determine if a guest returns to your hotel for a repeat stay.

Front Office SOP Templates Available

Download, customize and print your own SOPs to fit your property.



[Get the SOP Templates](#)

08 Guest Registration and Check-in

PURPOSE

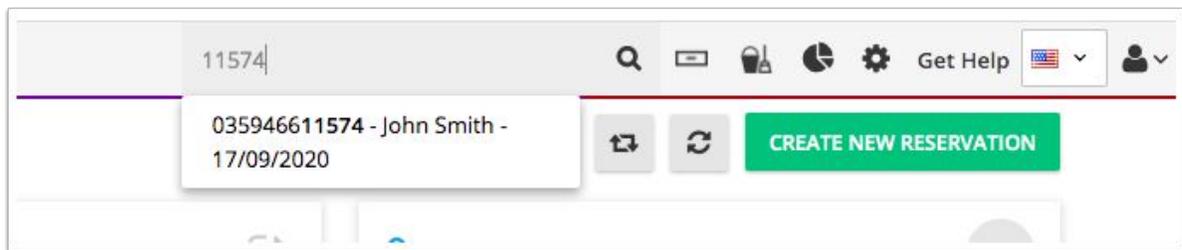
A front desk team member should greet the guest and make them feel welcome once they arrive at the hotel. The front desk employee should complete the guest registration process, check-in the guest and provide them with all the necessary information and services.

Traditionally, the guest is asked to confirm their details by completing and signing the registration card. This is done as a statutory requirement and also to verify that the details provided on the registration card are accurate. The card can be printed out. Alternatively, you can offer an option of online/digital check-in through mobile phones or through a check-in kiosk to improve the guest experience and to make the whole procedure faster and more efficient.



Procedure

1. Greet the guest. Make him or her feel welcome.
2. Ask for the guest's name and/or reservation ID.
3. Locate the reservation in your PMS system. Confirm that this is the right reservation by checking the stay dates, room type, reservation source, and other details with the guest.
 - *In Cloudbeds, you make a search by the name or the reservation ID. You may also check the [Arrivals section in the Dashboard](#).*



4. If the guest has checked-in online, ensure you have all the necessary information on file and proceed with step 8. Refer to [Contactless Check-in and Check-out](#) for more information.
5. If you are following the traditional method and use registration cards to collect the guest details, print out the registration card. Ask the guest to complete the registration card and explain briefly how to fill it in if needed. Ensure the guest has a pen and a comfortable place to complete the form.
 - *In Cloudbeds, you can [print out the registration card](#) directly from the reservation and it will be auto-populated with available reservation and guest details.*
6. Collect the form and confirm all the details have been provided and are legible. Ensure it is signed by the guest.
7. Request for ID(s) for local guests or Passport(s) and Visa(s) of international guests. All guests should provide their documents. Scan or photocopy it and attach it to the registration card.

7. Collect the payment if required and mark the reservation as “Checked-In” in your PMS system. Refer to [Handling Payments](#) for more information.
 - *In Cloudbeds, you can [post a payment as a record](#), add a [cash payment connected to the cash drawer](#), or [charge a linked credit card through a payment gateway](#).*
8. Provide the guest with a printed invoice or send it by email. Check out [Guest Invoicing](#) for more information.
 - *In Cloudbeds, you can [print out the invoice](#) directly from the reservation or send it to the linked email. There is also an option to generate [a separate invoice for each guest](#) or to bill the company.*
9. Provide the guest with all the necessary information about their stay.
10. Explain how to find the room or escort the guest to the room. Arrange for help with the luggage if needed. Ensure the guest is informed of the checkout policy, if any.

Additional Information to Provide During Check-in

- Upsell opportunities such as room upgrades, late check-outs
- WiFi password
- Hotel contact information
- Map of the property/ hotel
- List of rules and reminders (check-out times, incidentals authorization amount [per day or per stay], how to use magnetic key)
- Details about Mini-bar
- Booklets with Concierge services, hotel amenities and products
- Booklets with information about local signs and entertainment (you may contact your local tourist office to get it)
- City maps
- Hotel business card
- Mention any special occasions notated in the reservation such as the celebration of birthdays, anniversaries, or thanking repeat guests.

Guest Registration Card Requirements

Depending on your PMS system, you may edit the registration card and adjust it to your needs. Alternatively, you can create the needed template from scratch in a word processor or publishing software app.

Important fields to include in a Guest Registration Card template:

- Name
- Check-In Date
- Departure Date
- Reservation Number
- Room Type
- Room Number
- Email
- Phone
- Address
- City
- Country
- Postal Code
- Passport details (passport number, nationality, date of birth, passport issue date and expiry date, place of issue)
- Visa details (visa number, visa issue date, and expiry date, place of issue, type of visa, proposed duration of stay)

Consider adding the following fields:

- Company Name
- Meal Plan / Preference
- Contact Number / Person in case of emergency
- Purpose of Visit

Name John Smith	Check in Date 17/09/2020	Check out Date 18/09/2020
Reservation Number 035946611574	Third Party Confirmation Number _____	
Room Type Standard Double Suite	Room Number SDU(2)	
Phone Number _____	Email john.smith@test.com	
Customer Address1 _____	City _____	
State _____	Country United States	
Type of Document Passport	Document Number _____	

Terms & Conditions:

- Check-in time is from 14:00 and checkout time is until 12:00.
- Hotel management is not responsible for your personal belongings and valuables like money, jewelry, or any other valuables left by guests in the rooms.
- Regardless of charge instructions, I acknowledge that I am personally liable for the payment of all charges incurred by me during my stay at the hotel.
- I consent to the usage of my personal information for administrative and marketing purposes. The hotel guarantees do not disclose this information to 3rd parties.

Signature _____ Date _____

In Cloudbeds, you can [upload the header with your hotel logo and add more fields to the registration card](#). It is also possible to create [custom fields](#) and to add them to the registration card. The registration card is auto-populated with the reservation details and the unknown data fields will be completed by the guest.

- Generate and print out Arrivals Report in the morning or a day before to have a good overview of who is checking-in. If possible, add an estimated arrival time to the reservation and to the report.
 - *In Cloudbeds, there is a dedicated and easy to use [Arrivals Report](#) you can use for this purpose.*
- Consider offering a room upgrade to the guest if there's a better room available. Check [Room Allocation, Upgrade and Downgrade](#) SOP for more information.
- Consider offering an online self-check-in option to improve the guest experience. Airlines have been using online check-in for a long time and passengers love them. In the same way, this is becoming a common practice in the hospitality industry too. It is a convenient solution that meets the needs of modern travelers, saves the hotel time, and creates endless opportunities for upselling. There are many pre-check-in apps and solutions available on the market. They offer different features and may integrate with your PMS system. Refer to [Contactless Check-in and Check-out](#) for more information.
 - *Cloudbeds can be integrated with the following pre-check-in apps: [Trilyo](#), [Civitfun](#), [Hostellers](#), [Experience Hotel](#), [Wishbox](#), [Local Cave](#).*
- Inform about all the services and products offered by the hotel. Refer to [Upselling Additional Services and Products](#) for more information.
- Prepare Welcome Kits to be given to every guest on arrival. It can include a personalized welcome letter and all the additional information (booklets, special offers, etc).
- Consider using ID scan apps that can be integrated with your PMS to auto-populate guest details in reservations. This will make the registration process quicker and more professional.
 - *Cloudbeds integrates with [IDscan.net](#) and [Adria Scan](#). See all Cloudbeds' partners by visiting the [Marketplace](#).*

COVID-19 TIPS

- It is recommended to screen body temperature of all arriving guests at the hotel/property entrance. All visitors should be encouraged to use hand sanitizer and wear a face mask provided at the entrance. If a visitor has a temperature higher than 100.4°F (38°C) or is displaying or complaining of COVID-19 symptoms (cough, fever, sore throat, headache, muscle pain, shortness of breath, loss of taste or smell, chills), they should be kindly invited to a separate area for a second screening. The hotel should have a detailed documented second screening and case reporting protocols.
- Front Desk team members should wear face masks and keep physical distancing of 6 feet (1.5 meters) with guests and colleagues.
- The Front Desk area as well as other areas with heavy traffic or queues should be clearly marked for appropriate 6 feet (1.5 meters) physical distance between guests not traveling together.
- Plexiglass barriers can be added to areas such as the Front Desk where the guest and the employee cannot maintain a 6 foot distance.
- All guest touchpoints (pens, devices, countertop contact surfaces, payment terminals) should be disinfected after each guest contact.
- Add hand sanitizer and a complimentary face mask to the 'Welcome Kit' if the hotel is offering one for the guests.
- Remove all printed materials (business cards, booklets, city maps, etc.) normally displayed at the Front Desk. Add them to the individual 'Welcome Kit' or provide the same information online.
- Switching to contactless online or offline check-in is one of the best strategies to reduce human interaction and the risks of exposure to COVID-19. Refer to [Contactless Check-in and Check-out](#) for more information.
- At the Front Desk as well as throughout the hotel display visuals and signage outlining proper face covering usage, hand hygiene rules and current physical distancing practices.
- Develop a protocol for addressing guests/visitors that are not wearing a mask and/or social distancing.

09 Group Check-ins

PURPOSE

Normally all check-ins are handled by a Front Desk team member whose task is to complete the guest registration process, check-in the guest, and provide them with all necessary information and services. Handling group check-ins is more challenging so it requires strategic preparation. Usually this process is handled by the designated group reservation coordinator or several people if necessary, especially if the whole group arrives at the same time.



Procedure

Before Guest Arrival

1. Print out [Arrivals Report](#) in the morning or a day before to have a good overview of who is checking-in today. Add an [estimated arrival time](#) to the reservation so it will be shown on the report if possible. Mention all the necessary information and special remarks about the coming group during the staff briefing.

RESERVATION NUMBER	NAME	SURNAME	ARRIVAL TIME	ARRIVAL DATE	DEPARTURE DATE	ROOM NIGHTS	GUESTS	ROOM TYPE	ROOM(S)	CHECKED-IN?	UNASSIGNED
087932464936	Michael	Fox	Unknown	06/10/2020	07/10/2020	1	1	Suite	102	Yes	0
170371465645	Jessie	Rossmann	Unknown	06/10/2020	07/10/2020	1	1	Suite	202	Yes	0

2. The designated group reservation coordinator, if any, should be available at the time of the group check-in.
3. Prepare 'Welcome Kits' to be given to every guest on arrival. It can include a personalized welcome letter and additional information (check-out rules, contact information, booklets, special offers, etc). Remember, this is a chance to gain loyalty from people within the group. Someone who may not have chosen your property independently could be won by their group experience. This can lead to the guest returning for a stay in the future or recommending your property for events to other people/organizations.
4. Ensure that all allocated rooms are clean and ready for the check-in by the time of arrival.
5. Print out arrival registration cards for all guests and have pens/pencils readily available if you are using this method to register your guests.
6. Prepare the keys or keycards for all guests. The number of keys per room must match with the occupancy of the room. Match them with the registration cards and organize them in the alphabetic order before the guest's arrival. Refer to [Keys or Door Locks](#) for more information.
7. Choose an appropriate group check-in area depending on the size of the group, their transport to the hotel, the time of arrival, and where the group is staying.
8. If applicable, prepare welcome drinks and snacks to be served on arrival.

After Guest Arrival

1. Upon arrival, greet the group and make them feel welcome. Treat the guests with the welcome drink and snacks remembering every person in the group is a potential loyal guest in the future.
2. Assist the guest with the luggage if possible.
3. Hand out the registration cards and explain briefly how to fill it in. Make sure the guests have a pen and a comfortable place to complete the form. Alternatively you may offer an option of online check-in in advance.
4. Collect the forms and confirm all the details are there and legible. Ensure each card is signed by the guest.
5. Request for ID(s) for local guests and passport(s) and/or visa(s) of foreign guests. All guests should provide their documents. Scan or photocopy the documents and attach them to the corresponding registration cards.
6. Hand out the key cards and welcome kits.
7. Collect the payment from the representative or the guests if required and mark the reservations as In-House. Refer to [Handling Payments](#) for more information.
 - *In Cloudbeds, you can also perform check-in and add payments in bulk.*
 - *In Cloudbeds, you can [post a payment as a record](#), add a [cash payment connected to the cash drawer](#), or [charge a linked credit card through a payment gateway](#).*
 - *If a company or an organizer covers the costs, [link the transactions from the individual reservations to the group folio](#).*
8. Provide the guests or their representative with a printed out invoice or send it by email. Alternatively, you may bill the company. Check out [Guest Invoicing](#) SOP for more information.
 - *In Cloudbeds, there is also an option to [generate a separate invoice for each guest](#).*
9. Lastly ensure that each guest is aware of the check-out policy. Then, explain how to find the room or escort the guests to the rooms. Arrange for help with the luggage if needed.

- Consider offering an online self-check-in option. Cloudbeds can be integrated with the following pre-check-in apps: [Trilyo](#), [Civitfun](#), [Hostellers](#), [Experience Hotel](#), [Wishbox](#), [Local Cave](#). Check out [Contactless Check-in and Check-out Options](#) template.
- Consider using these ID scan apps, [IDscan.net](#) and [Adria Scan](#), to auto-populate guest details in reservations in Cloudbeds.

COVID-19 TIPS

- It is recommended to screen body temperature of all arriving guests at the hotel/property entrance. All visitors should be encouraged to use hand sanitizer and wear a face mask provided at the entrance. If a visitor has a temperature higher than 100.4°F (38°C) or is displaying or complaining of COVID-19 symptoms (cough, fever, sore throat, headache, muscle pain, shortness of breath, loss of taste or smell, chills) should be kindly invited to a separate area for a second screening. The hotel should have a detailed documented second screening and case reporting protocols.
- The Front Desk team and the designated Group Coordinator should wear face masks and keep a physical distance of 6 feet (1.5 meters) with guests and colleagues.
- Depending on the size of the group, a separate check-in area should be arranged for the guest registration or the guests should be separated in smaller groups. The Front Desk area should be clearly marked for appropriate 6 feet (1.5 meters) physical distancing between guests not traveling together.
- All guest touchpoints (pens, devices, countertop contact surfaces, payment terminals) should be disinfected after each guest contact.
- Add hand sanitizer and a complimentary face mask to the 'Welcome Kit' if the hotel is offering one for the guests.
- Switching to contactless online or offline check-in is one of the best strategies to reduce human interaction and the risks of exposure to COVID-19. Refer to Contactless Check-in and Check-out for more information.
- Develop a protocol for addressing guests/visitors that are not wearing a mask and/or social distancing.

10 Storing Guest Luggage

PURPOSE

Upon check-in and check-out, it is common for guests to request their luggage to be stored if their room is not ready or if they are going out for the day. In cases such as these it is important to anticipate the guests needs and prepare the staff members in handling guest luggage. Many larger properties have a dedicated department that handles guest luggage (Bell Desk) however smaller properties oftentimes utilize departments such as the Front Desk and/or Concierge in holding the guest's luggage. It is important to outline a detailed SOP if the property decides to offer guest luggage storage as it may be a potential liability.



Luggage Storage Procedure

Hotels can offer short and long-term luggage storage for a charge or for free. Short-term storage may come handy when the guest arrives before the check-in time or needs to store their luggage until later during the check-out day. When luggage is stored, it should always be tagged, typically by the bellman or Front Desk staff member. Long-term storage can be helpful when the guest needs to travel to another place for several days. It may be a good strategy to bring your guests back to stay in the hotel on their next visit.

When the guest is requesting to store his luggage:

1. Greet the guest and ask how you can help.
2. Listen to the request. Ask for the full name and ensure the guest settled their bill with the Front Desk or directly in the PMS system.
3. If the guest is checking in and their room is not ready, the guest should be provided the option of holding their luggage and introducing hotel amenities that can be used while they are waiting for their room.
4. Start filling in a storage request form.
5. Remind the guest to keep their valuable item with them (e.g. phone, wallet, camera, laptop, jewelry).
6. Ask if there are any perishable items inside (e.g. food or medication). If so, request that the guest remove them or arrange safe storage in the refrigerator if possible.
7. Check if the luggage is properly locked or has any damage. In case of any existing damage, inform the guest and make a note of it in the form.
8. Ask if there are any fragile items inside. If any, mark “Fragile” on the luggage tag.
9. Ask for the guest’s contact phone number and email.
10. Ask for the expected pick-up date.
11. Inform the guest about the storage charges, if any, and collect the payment. Refer to [Handling Payments](#) for more information.
12. Double-check all the details with the guest. Sign the form and ask the guest for their signature. Provide the guest with a receipt.
13. Tag the luggage (guest name, email, phone number, date and time of collection). Place the tag on all luggage pieces.

14. Inform the guest of the terms and conditions of luggage storage which should be clearly stated on the luggage storage request form.

When the guest comes to pick up his luggage:

1. Greet the guest and ask how you can help.
2. Ask for the receipt. If the receipt is lost, ask for the ID and check for the corresponding records in the Left Luggage Register.
3. Ask the guest for a brief description of the luggage.
4. Check the receipt and bring out the luggage pieces from the luggage room.
5. Make a new entry in the Left Luggage Register.

Luggage Room Organization

- The luggage room should be always well organized and neat. It should be divided into 3 areas: arrival, departure, long term storage.
- Always keep the luggage room closed and dry.
- Do not leave any guests alone in the luggage room.
- Store the suitcases and other pieces of luggage in a way that the tags are clearly visible.
- The security of the luggage storage room is very important to prevent liability due to lost guest items. It is recommended to create a detailed policy on how the luggage room is secured, handled and who has access to the room.

TEMPLATES

→ [Storage Request Form Template](#)

[Get the Template](#)

- In the case of a large group arrival, it is recommended to assign team members to help with the luggage while the group is checking in at the Front Desk or designated group check-in area. If the group is delivered by a bus, you can unload the luggage as quickly as possible in order to keep the hotel entrance open for other guests and place the suitcases in neat lines next to the entrance. Check the number of pieces with the driver and tour operator and ensure that there are enough staff present to monitor the luggage if multiple trips are needed to carry the luggage inside. Never leave guests' luggage unattended to go inside the hotel/property. Refer to [Group Check-ins](#) for more information.
 - *In Cloudbeds, with Group Housing feature enabled, you can create [group profiles](#) and attach documents to it if necessary.*
- If you are charging for luggage storage, you can create a luggage storage fee as a separate item in Cloudbeds and add it to the reservation or to a dedicated [house account](#).
- Consider using hotel stickers for publicity every time the luggage is handled by the bell desk or other team members. The guest may leave the sticker on the suitcase for a while and your hotel logo can be displayed to a wider audience.
- If you are not offering the luggage storage option, give the guests recommendations of luggage lockers available in the local area.

COVID-19 TIPS

- Sanitizing all luggage and packages using UV technology upon arrival and before storing luggage is one of the easiest and effective ways to enhance hygiene and safety at the hotel.
- The Front Desk or other team members handling luggage storage should wear face masks, keep a physical distance of 6 feet (1.5 meters) with the guests and colleagues and sanitize hands after handling guest luggage.
- All guest touchpoints (pens, countertop contact surfaces, payment terminals) should be disinfected after each guest contact.

11

Room Allocation, Upgrade and Downgrade

PURPOSE

Hotels and properties generate most of their revenue by selling rooms or other types of accommodations. That is why it is important to make sure that the right room is sold for the correct rate, and that the guest is allocated in the appointed room. The front desk is responsible for room assignment and should follow documented guidelines when providing an upgrade or downgrade.



Room Allocation Procedure

- Make sure you are familiar with all room types and accommodation units offered by the hotel/property. This includes understanding their differences, specifications, occupancy, location, and additional options (e.g. extra bed).
- If you are using the [Auto Assignment option](#) in Cloudbeds or another PMS system, check all online and third-party reservations received during the day on a daily basis and make sure the guests get the most suitable room allocation, ensuring there are no unassigned reservations left.
- Generate the [arrivals list](#) for the next day and make sure all guests have the correct room assignment.
- During check-in, confirm the room type with the guest and check if they have any additional requests. Ensure that the room assigned to the reservation corresponds to the specified room type.
- If there are upgrade options available for the requested dates, try to upsell a higher room to the guest. Room upsell can be offered for a discounted or full price depending on the hotel/property availability and the length of stay of the guest.
- If there is a mistake or the guest simply wishes to change his room type, try to accommodate the guest's requests as best as you can:
 - [Reassign](#) the room number.
 - [Split the reservation](#) into two parts.
 - Offer a room upsell.
 - Offer a room upgrade or a downgrade. In this case, make sure you are following the hotel's policies and documenting all the changes and requests in the [reservation notes](#).

Room Allocation Guidelines

- Special requests mentioned in the reservation should be given priority. Those may include non-smoking/smoking room type, twin/king room type, garden/street view, etc.
- Guaranteed early check-in or late check-out reservations should be monitored closely and allocated accordingly. Refer to [Early Check-ins and Late Check-outs](#) for more information.
- In the case of repeated guests, any special requests and preferences mentioned in the guest profile and history should be taken into consideration. Some guests prefer to stay in the same room number or on the same floor. It is also important to resolve all guest complaints and remarks. For example, if the guest complained about the street noise last time, make sure to place them in a quieter room if possible.
- Groups and guests traveling together should be allocated on the same floor or as close to each other as possible unless they requested otherwise.
- General aspects, like the purpose of stay, the number of guests, gender and age of the guests, are taken into account too. Couples should get a King/Queen room with a double bed, while 2 friends or families traveling together should get a Twin room. Senior guests should get a room on the first floor or near the elevator. In the case of the rooms with a shared bathroom, single women or men should be allocated next to the same gender.
- If your hotel/property is suitable for disabled guests, it is important to allocate the corresponding room on the first floor for them. All special necessary arrangements should be done before their arrival too.
- Guaranteed pre-paid reservations should get priority before unconfirmed reservations or walked-in guests.
- Problematic or least favorable rooms should be assigned last and for the minimum length of stay. Those may include rooms with temporary outages, rooms with little windows and no natural light, rooms with an unattractive view, etc.

Room Upgrade and Downgrade Guidelines

The guest may be upgraded and allocated into a better room than that in which they are currently assigned. To maximize the revenue per available room, the front desk team should follow the following room upgrade guidelines and obtain approval from the manager before offering the guest an upgraded room. In this case, the guest should be informed about the situation and explained the differences between the two rooms. Some scenarios for qualified room upgrades are listed below:

- A room upgrade was guaranteed in the past as a service recovery and is mentioned in the guest profile or history.
- A room upgrade is offered for repeated guests as a part of the Loyalty or Reward Points Program.
- The guest is having a bad experience or reporting some issues in the allocated room and there is no equivalent room available.
- If the property is close to the full occupancy and the most popular room type is fully booked, regular or corporate guests can be offered an upgrade in order to free up the needed room type for new reservations.
- When the guests are having a special occasion like a honeymoon or anniversary, offer a complimentary room upgrade to one of the upgraded room types to win the guest loyalty.
- When the booked room type is not available at the time of the check-in or it is overbooked for one night of the stay.
- If room upgrade is inevitable, repeated guests with special status and the reservation with short stays should be given a priority.

Downgrading the guest to the less expensive room should be always avoided unless directly requested by the guest. Still, room downgrades can be the only option left to allocate the guest when the rest of the rooms are occupied. In this case, the front desk team member should explain the situation to the guest and explain the differences between the two room types. As a rule, the difference in room cost should be refunded if other credits are not offered. Service recovery should be discussed with the manager if necessary and can include the following:

- A written apology from the general manager
- Free bottle of wine
- Rewards points
- Free complimentary breakfast or meal
- Discounts or upgrades for future visits
- Free additional products or services offered by a hotel

- It is important to document all remarks, preferences, complaints, and services offered in the notes in the PMS. This will allow you to have an updated guest profile and history in order to make the right decision related to guest management. Please note that there are different types of notes in Cloudbeds: [reservation notes](#), [guest profile notes](#), [group profile notes](#), and [allotment block notes](#). The last two are available when the Group Housing feature is enabled.
- *In Cloudbeds, you can easily keep an eye of all new third party reservations in today's activity in the [Dashboard](#) tab or go through all [reservation notifications](#) in your mailbox.*
- Keep in mind that if the [Auto Assignment option](#) is enabled in Cloudbeds, all new reservations will be auto-assigned to the first available accommodation within that room type. When operating close to full occupancy and there is no continuous availability, the system will not rearrange previously assigned reservations to fit the new reservation. The reservation will be added to the unassigned room queue to be assigned manually. In these cases, you may have to [split the reservation](#).
- *In Cloudbeds, when you need to move a reservation to another room type, you can [drag and drop the reservation in the calendar](#) adjusting or keeping the same price. Otherwise, you can do all the necessary [changes directly in the reservation tab](#).*

12 Overbookings During Check-in

PURPOSE

Even with all precautions to prevent overbookings and/or attempts to catch overbookings before the guest arrives, you may not catch the overbooking until the guest's arrival or the management team may have decided to postpone the relocation decision to the last minute. In this case, the Front Desk team needs to take care of the overbooked guests on the spot. Guests relocated at the desk at times can feel upset and express frustration. These guests can still be recovered with skillful management and best practices.



Procedure

1. Greet the guest and carefully explain the situation. It is possible, the guests may be upset, but you will want to remain patient, friendly, and understanding to achieve the most favorable outcome. As the situation is explained, it will help the guest feel valued and receive a sincere apology on behalf of the hotel.
2. Make sure the manager or senior team member is aware of the situation and readily available to personally handle relations with all guests to be walked.
3. If a resolution hasn't yet been made, make the guest comfortable in the lobby or the restaurant while he needs to wait. Offer complimentary drinks or snacks.
4. Once the guest understands the situation, carefully explain the arrangements and the compensation policy. Offer several options to choose from if possible.
 - Industry standard is to cover the costs of 1 night room+tax, transportation to and from relocation hotel, one phone call, and internet access at relocation hotel. The guest returns to your hotel after the 1st night for the remainder of their stay.
5. If the guest doesn't have transportation, arrange for a taxi and a hotel car to bring the guest to the relocation hotel.
6. If the guest has a multi-night stay, suggest to bring him back the next day if the room is available. Ask for the proper timing to arrange for the transportation if necessary. If the guest decides to stay at another hotel, kindly clarify that your hotel is responsible to cover the first night's room and tax only.
7. If applicable inform the third party booking partner about the relocation, where the guest will be relocated to and what compensation to be offered. If the reservation is commissionable, full payment of the commission must be made as if the guest had stayed at our hotel.
8. Cancel the reservation of the relocated guest in the PMS with the appropriate note. You need to make sure that the guest is treated with extra care next time he returns and the situation is not going to happen again.
 - *In Cloudbeds, add all the necessary details to the [reservation notes and to the guest profile](#). Consider adding a [special guest status](#) to the guest profile.*

Sarah Mcalister
137320185699

CANCELLED RELOCATED ACTIONS

Cancellation #	Cancellation fee	Check-In	Check-Out	Nights	Reservation date	Guests	Source	Rate Plan(s)	BALANCE DUE
09856467908	\$ 0,00	09/10/2020	10/10/2020	1	06/10/2020	1	Walk-In	Base Rate	\$ 100,00

Accommodations Folio Guest Details Credit Cards **Notes (1)** Documents Reservation Activity Email Messages

Olga Obernikhina at 06/10/2020 12:57 PM
There was an overbooking on the 9th of October due to the simultaneous bookings in Booking.com. It was decided to relocate this reservation to our partner hotel City Zen. The guest was informed on the 6th of October.

9. If you allow overbookings and walking guests happens on a regular basis, consider running a separate report or log for these cases. Fill it in right after the situation has been handled. It can include such fields as guest name, original reservation number, stay dates, partner hotel, compensation offered, relocation and compensation costs, and guest's attitude.
10. If not done earlier, determine the reason for the overbooking(s). You can get in touch with Cloudbeds support to help you to investigate the issue and to eliminate the cause.
11. If the guest returns to the hotel the next day, create a guest recovery plan and use this opportunity to gain him loyalty and trust back. Consider offering the following extras:
 - Room upgrade if available
 - Hand-written note waiting in their room
 - Free bottle of wine
 - Rewards points
 - Free complimentary breakfast or meal
 - Free room upgrade
 - Discounts or upgrades for future visits
 - Free additional products or services offered by a hotel
 - Send an email with an apology and hotel vouchers if any on behalf of the hotel or the general manager the next day.

TEMPLATES

→ Apology Email Template

Get the Template

- Display genuine care, empathy, concern, and understanding. Be patient, but firm and stand your ground. Don't let the guest's emotion control yours. The guests will be upset, you will want to remain patient, friendly, and understanding for the best results. This is an opportunity to showcase your professionalism and define your business reputation.
- Establish partnerships and agreements with neighboring hotels that offer comparable quality, guest experience, and location. Many hotels will offer each other discounts in exchange for the same courtesy, so it pays off to have an overbookings plan in place ahead of time.
- Do your best to make sure you're aware of all overbookings in advance. You can monitor new reservations, canceled reservations, and current availability on a daily basis. Analyze arrivals on a daily and weekly basis. Looking on the [Cloudbeds Dashboard](#) would be helpful here. You can run nightly [Departures reports](#), [Arrivals reports](#), and [In-house reports](#) to get a clear picture of your property. You can spot an overbooking in the Dashboard section or it will be indicated by a red negative occupancy on the Calendar.
- Take a tactical approach when deciding which guest has to be relocated. There are several factors to consider before choosing the guest who needs to be walked:
 - The source of the booking
 - Booking date
 - The duration of the stay
 - The purpose of the stay
 - Group vs. Individual reservations
 - Fee agreements or penalties from third parties
 - Guests' status, reservation history (number of stays and revenue generated), and rewards program. Looking at [Cloudbeds Guests Profiles](#) can help you here.

13

Handling Payments

PURPOSE

An in-depth procedure on handling guest payments is crucial to a successful property operation and will reduce the likelihood of revenue loss. Typically, the guest's balance is paid for during check-in or upon check-out. Depending on the property policy, they may also be charged a deposit or full amount in advance to guarantee their booking. The Front Desk team is usually responsible for charging the guests and recording guest payments in the PMS. It is important to have correct records in the reservation folios as they link to the reports and affect the total financial figures.

To ensure that guest payments are handled correctly and to avoid fraud, there should be a separate documented procedure for every payment method accepted by the property such as cash, credit card, voucher, bank transfer, and direct billing. The Front Desk team should also know to process refunds and make adjustments in the reservation folio in the case of a mistake or a discount.

Properties may choose to charge upfront an incidental deposit/in-house credit to cover guests' additional purchases such as charging services back from the spa to the guest room or on-property restaurant bills and/or to charge the guest for verified damages made to the room during their stay. An incidental deposit can be made in the form of different types of payments including cash, credit or debit card, or any other accepted form of payment and should be refunded if not utilized during the stay at the time of check-out. If an incidental deposit is not collected at the time of check-in, the guests' ability to charge back to the room should be denied.

Cash Payments

The Front Desk team should be extra careful while handling cash payments and check all bills to ensure they are not counterfeit.

Getting Started Checklist:

- [Enable cash as a payment option](#) in your PMS.
- [Create cash drawers](#), if applicable.
 - *Cloudbeds offers the [Cash Drawer feature](#).*
 - You can utilize it to mirror the actual cash drawers at the property.
 - This is a great way to keep track of the property's physical cash flow.
- [Enter in the system all accepted currencies](#), if applicable.
 - Cloudbeds supports the [multi currency feature](#).
 - It is possible to add all acceptable foreign currencies with a manual or an automatic exchange rate.
 - The payment is automatically converted by the system and the reservation folio will list the amount in the selected currency.

The screenshot displays the Cloudbeds PMS interface for a reservation. At the top, the guest name "Sandra Johnson" and ID "015342759660" are shown. Below this, a table provides reservation details: Check-In (25/12/2020), Check-Out (28/12/2020), Nights (3), Reservation date (22/12/2020), Guests (1), Group Profile (Smith Wedding), Allotment Block (Friends), Source (Website / Booking Engine), and Payment Type (Credit Card). The balance due is € 0,00. The interface includes navigation tabs for Accommodations, Folio, Guest Details, Credit Cards, Notes (1), Documents, Reservation Activity, and Email Messages. The "Folios" section is active, showing a list of transactions with columns for Reservation ID, Date/Time, Name, Room, Type, Notes, Quantity, Debit, and Credit. The transactions include a cash payment of € 173,84 and two room rates of \$ 70,00.

RESERVATION ID	DATE/TIME	NAME	ROOM	TYPE	NOTES	QUANTITY	DEBIT	CREDIT
015342759660	28/12/2020 03:46 PM	Sandra Johnson	101	Cash 101				€ 173,84
015342759660	27/12/2020 11:59 PM	Sandra Johnson	101	Room rate - Single Room (Friends) 101			\$ 70,00	
015342759660	26/12/2020 11:59 PM	Sandra Johnson	101	Room rate - Single Room (Friends) 101			\$ 70,00	

Handling Cash Payments Checklist:

- Inform the guest about the currencies you accept.
- If the guest chooses to pay in foreign currency, and the property is not using the [multi currency feature](#) in the Cloudbeds PMS, be sure to convert it accordingly using the appropriate currency exchange rate. Take time to ensure that the calculation is accurate.
- If the property will collect an incidental deposit, charge the full room rate, taxes, and an additional amount as an in-house credit that would be used to cover room service costs, mini-bar purchases, restaurant tabs, spa bills, etc.
 - Explain to the guest what the credit will be used for.
 - Be sure to confirm the received amount is accurate.
 - Explain a refund will be given at the time of check-out if the guest does not charge back or if they have a remaining credit.
- Collecting an incidental deposit is typically optional, and it depends on the property's policy. If the guest refuses to provide it, be sure to explain they will not be able to charge anything back to their room.
 - Block the guest name and room number in the POS terminal to prevent charges to the room or alert other departments that this guest has not been extended charge privileges.
 - Remove or lock the guest room minibar.
 - Have credit card information as a backup for potential room damages if the guest has paid in cash.
- Always check if the bills are counterfeit:
 - If **one** of them is counterfeit, inform the guest, and explain that you cannot accept it. Ask for another bill or offer a different payment method.
 - If **all** of them are counterfeit, inform the guest and alert your security team or property management. Depending on the case, they may need to notify authorities. Add the necessary remarks to the [reservation notes](#) or [guest profile](#) in the PMS system.
- Calculate change if needed.
 - The change should be given back in local currency.
 - To ensure accuracy of the cash collected, it's common practice to count the cash with the guest present.

Add the cash payment to the reservation:

In Cloudbeds, in-house credit can be added to the reservation folio as a cash payment with the corresponding note.

RESERVATION ID	DATE/TIME	NAME	ROOM	TYPE	NOTES	QUANTITY	DEBIT	CREDIT
784515224663	29/09/2020 06:04 PM	John Smith	Walk in the forest	Cash	Walk in the forest In-House Credit			50,00

- Be sure to select the correct cash drawer, if applicable.
- Provide the guest with a receipt.
- Provide the guest with a printed invoice or send it by email.

Ongoing Checklist:

- Utilize the [Cashier Report](#) to track cash transactions, see drawer opening and closing balances for specific dates/period, as well as check overages/shortages during frontdesk shift.



Credit Card Payments

Credit cards have become the most common payment method in the hospitality industry. Properties and booking channels often charge a credit card in advance to guarantee the reservation.

Businesses pay a commission to the credit card issuing company, such as Visa, Mastercard, Discover, American Express, etc. As the commission percentage may vary, properties often limit the card types they accept and establish which credit card companies are preferred.

The Front Desk team should always check if:

- The card type is accepted.
- The credit card number is valid.
- There are sufficient funds on it to cover all guest's expenses and incidental charges.
- The name on the credit card matches the guest's form of identification.
- The credit card is fraudulent. Be sure to always capture all details when you suspect that is the case.

Note that, for security purposes, credit card details are stored in the PMS for a limited period of time. [Credit card access](#) is also blocked from Cloudbeds 14 days after the reservation's departure date for confirmed reservations and 30 days for canceled/no-show reservations. Only the last four digits and the card type will remain. [Cloudbeds Payments](#) does allow more flexibility and credit card information (token) is stored in the guest's reservation for [30 days \(for confirmed, cancelled and no-show reservations\)](#).

It is important that if the credit card information is stored outside of the PMS that 'Payment Card Industry Compliance' laws are followed.

Getting Started Checklist:

- [Enable credit card as a payment option.](#)
 - Be sure to add all accepted credit card types.
 - *Determine where the payment option will be available: direct reservations and/or Cloudbeds Booking Engine.*
- [Grant credit card viewing privileges to all applicable staff.](#)
 - Applicable only if the property is not using a payment processor.
 - Only the Property Owner is granted by default the permission to view credit card details.
 - *All other Cloudbeds users need to be granted permission by the Property Owner.*
- [Ensure all users create the credit card viewing password.](#)
 - Applicable only if the property is not using a payment processor.
 - *All Cloudbeds users with granted permission must create a credit card viewing password.*
- [Enable and configure the payment processor, if applicable.](#)
 - Also known as a payment gateway, this feature automates payment transactions, allowing properties to process, verify, and accept/decline credit card transactions on behalf of the merchant through secured internet connections.
 - *Cloudbeds offers its own payment processor, [Cloudbeds Payments](#), which is a fully integrated all-in-one solution that streamlines operations with one system, eliminates the need to track and report transactions in multiple platforms, reduces costs, and offers in-house support. It connects to your bank account and transfers funds directly into it.*
 - [Cloudbeds also integrates with a number of existing payment processors.](#)
 - Pay special attention to the [processing methods configuration](#). [Automatic payment processing](#) can authorize or charge a credit card with the [configured deposit amount](#) according to the established schedule. For example, the property can configure the system to automatically charge the required advanced deposit as soon as the reservation is confirmed.

PROCESSING METHODS

Select a default method for new reservations from the Internet Booking Engine, as well as OTAs (if Distribution is enabled).

Mybooking Reservations ⓘ

Do nothing. I will process payments at a later time ⓘ

Authorize credit card for amount of deposit, but do not collect the payment ⓘ

Process the payment for amount of deposit ⓘ

Would you like this action to be performed immediately after receiving the reservation, or postpone it until closer to the arrival date?

Perform this action immediately

Postpone until closer to arrival date ⓘ

Handling Credit Card Payments Checklist:

- Inform the guest what are the accepted credit card types.
- Verify the credit card details carefully:
 - If not present yet, [add the credit card details](#) to the reservation.
 - Confirm that the cardholder name matches the guest name on the reservation and the name on the photo ID.
 - The signature should coincide with the guest signature on the registration card.
 - Check both the credit card and ID expiration date.
 - If the credit card does not belong to the guest, ask if the card owner is present and associated with the reservation. The guest may be using a partner's or relative card and if so, the card owner must be present. If the card owner is not present, another form of payment should be requested to prevent credit card fraud.
 - This could be a "Direct Billing" scenario. Please review this [guideline](#) if so.
 - If you suspect that the card is stolen, alert your security team or property management. Depending on the case, they may need to call the police.
- If the property will collect an incidental deposit, [authorize](#) the full room rate, taxes and an additional amount as an in-house credit that would be used to cover room service costs, mini-bar purchases, restaurant tabs, spa bills, etc.
 - Explain to the guest what the credit will be used for.
 - Be sure to confirm the authorized amount is accurate.
 - Review the process of refunding the credit if the balance is not utilized during their stay.
 - Typically refunds are processed at the time of check-out if the guest does not charge back or if they have a remaining credit. Refunds to the guest's credit card processing time is dependent on the credit or debit card company. On average it takes 5-10 business days.



- Process the payment utilizing either a terminal or a payment gateway, whichever is available at the property.
 - For payments processed through a terminal:
 - Ensure the amount to be charged matches the balance due in the reservation in your PMS.
 - Process the charge.
 - Politely ask the guest to sign the charge slip, if applicable.
 - Provide the guest a copy of the charge slip.
 - Register the payment in your PMS. *In Cloudbeds, you can easily [record a credit card payment](#) which was processed externally through a payment terminal.*
 - Thank the guest and return their credit card.
 - Provide the guest with a [printed invoice or send it by email](#).
 - For payments processed through a payment gateway:
 - Ensure the amount to be charged matches the balance due in the reservation in your PMS.
 - [Process the charge](#).
 - Provide the guest with a [printed invoice or send it by email](#).
 - *It is also possible to [manually authorize](#) an in-house credit and to [charge additional charges](#) directly from Cloudbeds.*
- If the credit card is not valid or gets declined, ask the guest to provide another card or offer an alternative payment method.
- Ask the guest if they would like to leave a credit card on file for incidentals.
 - Explains this allows them to charge items or services back to their room.
 - [Add the credit card details](#) to the reservation in the PMS system.
 - If there is a credit card in the reservation, confirm it can also be used for incidental charges.

Ongoing Checklist:

- Utilize the [Payment Processing Report](#) to track credit card transactions made through the payment gateway.

DATE	GUEST NAME	RESERVATION ID	GATEWAY TRANS. ID	ARRIVAL DATE	DEPARTURE DATE	CREDIT CARD TYPE	CREDIT CARD NUMBER	STATUS	GATEWAY RESULT	PAYMENT TYPES	AMOUNT
27/03/2020 14:29	Bruce Comber	403937049668	ch_1G...JVeGC	28/03/2020	29/03/2020	Visa	x1111	Successful		Gateway payment	\$ 64,00
30/04/2020 10:14	Tom Holland	593735971804		30/04/2020	02/05/2020	Visa	x1111	Failed	Amount must convert to at least 50 cents. \$10.00 converts to approximately \$0.30.	Gateway Authorization	\$ 10,00
05/06/2020 02:10	yuyuk tuti	885410937667		10/06/2020	11/06/2020	Visa	x1111	Scheduled		Gateway payment	\$ 500,00

Direct Billing/Travel Vouchers

Direct billing is an arrangement where guest charges will be paid by a third party not staying on property, or other sponsoring organization.

Travel vouchers are special documents issued to guests by travel companies and airlines stating the services that have already been paid for and will be provided by the property to the guest.

Usually, companies cover all room costs and guests are responsible for all incidental charges.

Properties need to create an agreement with these third parties outlining all direct billing and travel voucher terms and conditions.

Cloudbeds offers two functionalities that can help the property handle this payment method: [Split Folio](#) and [Groups](#). Using such features allows properties to route the applicable transaction to the company profile and provide accurate invoicing.

Getting Started Checklist:

- [Enable Direct Bill](#) as a payment method.
- Determine which companies direct billing will be offered as a payment option.
- Be sure the company signs the agreement with all applicable terms and conditions before actually accepting this payment method.
 - Confirm the agreement clearly states which transactions will be covered by the company.
- Inform all relevant departments about these agreements.
- [Create separate folios for the company and the guest](#) in your PMS.
 - The system will then automatically route the applicable transactions to the company folio when the reservation is created.
 - The property will also be able to print different folios and generate separate invoices.
- Create [a group profile](#) to automatically route all applicable transactions to the company.
 - This is optional and can also be used for wholesalers, travel agents, etc.

Handling Direct Billing Checklist:

- Request corporate or personal identification from the guest.
 - Ensure they are authorized to qualify for direct billing.
- Be sure to check the travel voucher.
 - Confirm the reservation was created under the company or travel agent group profile or source.
- Check if there is any credit limit per employee/guest.
 - Confirm which charges will be covered by the company.
- Inform the guest about the conditions of their stay.
 - Explain which expenses will be covered by the company.
 - Reinforce which charges will be of the guest's responsibility.
- Charge guests for any incidentals immediately if they are purchased.
 - If a guest makes any purchases they are responsible for, send a separate invoice to the guest upon checkout.
- If applicable, ask the guest to provide a credit card number or in-house credit (cash payment) for incidentals.
 - Explain to the guest what the credit will be used for.
 - [Add the credit card details](#) to the reservation in the PMS system.
- [Send the invoice to the company.](#)

Sarah Black
131860872936

Check-In: 02/10/2020 | Check-Out: 04/10/2020 | Nights: 2 | Reservation date: 30/09/2020 | Guests: 1

Group Profile: **ABC Company** | Alignment Book: **ABC Company** | Estimated Annual Time: Unknown | Source: Website / Booking Engine | Rate Plan(s): Base Rate

BALANCE DUE \$ 30,00

CONFIRMED | ACTIONS

Accommodations | **Folio** | Guest Details | Credit Cards | Notes (0) | Documents | Reservation Activity | Email Messages

FOLIOS

Company Folio

ADD / REFUND PAYMENT | ADD / ADJUST CHARGE | MOVE TRANSACTIONS

RESERVATION ID | DATE/TIME | NAME | ROOM | TYPE | NOTES | QUANTITY | DEBIT | CREDIT

RESERVATION ID	DATE/TIME	NAME	ROOM	TYPE	NOTES	QUANTITY	DEBIT	CREDIT
131860872936	03/10/2020 11:59 PM	Sarah Black	SD(2)	Room rate - Standard Single SD(2)		1	100,00	
	02/10/2020 11:59 PM	Sarah Black	SD(2)	Room rate - Standard Single SD(2)		1	100,00	
131860872936	02/10/2020 11:59 PM	Sarah Black	N/A	Test Edited N/A		1	2,00	
TOTAL							0,00	0,00

Transaction Transferred to: ABC Company - g892039 - View

Refund | Pending | Transferred Transaction

Guest Folio

ADD / REFUND PAYMENT | ADD / ADJUST CHARGE | MOVE TRANSACTIONS

RESERVATION ID | DATE/TIME | NAME | ROOM | TYPE | NOTES | QUANTITY | DEBIT | CREDIT

RESERVATION ID	DATE/TIME	NAME	ROOM	TYPE	NOTES	QUANTITY	DEBIT	CREDIT
131860872936	30/09/2020 03:53 PM	Sarah Black	SD(2)	Breakfast SD(2)		2	25,21	
131860872936	30/09/2020 03:53 PM	Sarah Black	SD(2)	VAT 19% SD(2)		1	4,79	
TOTAL							30,00	0,00

Refund | Pending | Transferred Transaction

Ongoing Checklist:

- Check for direct billing payments:
 - Consider the deadline established in the signed contract with the company.
- If applicable, follow-up about outstanding payments.
- [Record the payment in the Cloudbeds PMS.](#)
- Ensure rate and room type agreements with Direct Billing partners align with your current sales strategy.
- Keep contact with direct billing partners if their use of your property noticeably declines.
 - Evaluate if any declines may be service or guest feedback related.
 - Renegotiate policies, rates, or services if needed.

PayPal Payments

PayPal is one of the most popular payment methods on the internet and can be a great alternative solution to guarantee a reservation.

- *In Cloudbeds, [PayPal can be enabled as a payment method](#) for reservations made through the Booking Engine.*
- The property must enter in the Cloudbeds PMS its Paypal account information whenever it decides to offer this option to its guests.
- This payment option will only be available in the Cloudbeds Booking Engine when the property requires a [deposit amount](#).
- The deposit amount for reservations created via Cloudbeds Booking Engine will be transferred directly to the property's PayPal account.
- When a reservation is created with PayPal in Cloudbeds Booking Engine, the guest is redirected to the PayPal payment page where they need to complete the payment by logging into an account or simply using a credit card.

Getting Started Checklist:

- Set up the property's [deposit policy](#).
 - PayPal will only be available if the property requires an advanced deposit.
- [Enable Paypal as a payment method](#).

Ongoing Checklist:

- Be sure to check all reservations received with PayPal as a payment method.
 - Note that reservations which are made with PayPal come into the Cloudbeds PMS without credit card details. It means that if the property sets up a policy to charge a deposit that is any less than 100%, the staff will have to contact the guest to ask for credit card details in order to cover the remaining balance.
 - Use the [Payment Ledger](#) report. Be sure to select PayPal as Payment Type:

The screenshot shows the Cloudbeds PMS interface for the 'Reports / Payment Ledger' report. The top navigation bar includes 'Dashboard', 'Calendar', 'Reservations', 'Groups', 'House Account', 'Rates and Availability', 'Guests', and 'Reports'. The 'Reports' menu is active. The main content area has a 'FILTER' section with the following options:

- Payment Type: MULTIPLE (dropdown)
- Payment Date: 01/21/2022 - 01/22/2022 (calendar icon)
- Associated Transactions: MULTIPLE (dropdown)
- Posted / Pending Transactions: POSTED, PENDING (dropdown)
- Res #, Room #, Guest Name: (text input)
- Check-in Date: (calendar icon)
- Check-out Date: (calendar icon)

Below the filters, there is a 'Sub-group by' dropdown (currently 'ED'), a 'Status' dropdown (currently 'ALL'), and a 'Type' dropdown (currently 'ALL'). There are 'APPLY' and 'CLEAR' buttons. A table is visible below the filters with columns: AMF, SURNAME, RES #, TRN CODE, DESCRIPTION, CHECK-IN, CHECK-OUT, STATUS, NOTE, QTY, DEBIT.

Bank Transfers

Bank transfers are a less common form of payment in the hospitality industry as travelers prefer the convenience and security of online payments. Also, banks may charge additional transfer fees and it may take up to 2 weeks for international transfer to be completed. Nonetheless, if online payment options are not available at the property, bank transfers can be a great alternative solution to guarantee a reservation.

In Cloudbeds, the [bank transfers can be enabled as a payment option](#) for direct reservations and/or bookings made through the Booking Engine.

Getting Started Checklist:

- [Enable bank transfer as a payment method.](#)
 - To ensure that your guests have the correct information, make sure to list your property and bank addresses along with all the bank account details. This will help ensure that payments are processed efficiently.
 - Provide a deadline prior to the arrival date and require that guests send the property the payment proof.
 - Be sure to provide instructions to guests to send the receipt to the property as soon as the transfer is completed.
- Set up the property's [deposit policy.](#)
 - Bank transfer will only be available if the property requires an advanced deposit.
 - It is highly recommended, in case of payments by bank transfers, to require 100% deposit at the time of booking to ensure no delays or later issues with insufficient funds.
 - [Require confirmation of the deposit payment before reservation is confirmed.](#)
 - The reservations will be marked as Pending Confirmation when a new reservation is made in the Cloudbeds Booking Engine or on the Facebook app.
 - The system will automatically generate the Pending Confirmation email to the guest. Upon verifying payment, the status will need to be manually updated to Confirmed, at which point you will be asked whether to send a confirmation email to the guest.
- [Add a message at the end of the total amount confirmation page in your Cloudbeds Booking Engine.](#)
 - Instruct guests that, in the event of bank transfer payments, to send an email to the property with the payment proof.

Your Reservation	
Room Selections:	
Standard Quadruple Room (x1)	
Adults: 1 Children: 0	
Arrival Date:	
01/28/2022	
Departure Date:	
01/29/2022	
Room Nights:	
1	
Room Total:	USD 135.00
Extra Adults (x0):	USD 0.00
Extra Child(ren) (x0):	USD 0.00
Total Taxes:	USD 30.25
Grand Total:	USD 165.25
Advance amount:	USD 82.63

In the event of payment via bank transfer, please send payment receipt to property@nomail.com 3 days prior to check-in, otherwise, the reservation will not be confirmed

Ongoing Checklist:

- ❑ Review on a daily basis all reservations with confirmation pending status.
 - Run the Account Balances Report to identify all reservations listed as confirmation pending. Be sure to select *Pending* under the status filter.

The screenshot shows the 'Daily Activity Reports / Account Balances' interface. The 'Reservation Status' filter is set to 'PENDING'. A dropdown menu is open, showing 'Pending' selected with a checkmark. The table below shows columns for RES #, NAME, SURNAME, DATE BOOKED, CHECK IN DATE, CHECK OUT DATE, RESERVATION STATUS, SOURCE, GRAND TOTAL, AMOUNT PAID, BALANCE, and NOTES.

- Confirm the payment method is bank transfer. [Add a note](#) to the reservation stating the property is awaiting the payment receipt.

The screenshot shows the reservation details for reservation 7988892924009. The reservation is confirmed pending. The payment type is 'Bank Transfer'. The balance due is BRL 200,00. The reservation details table shows the reservation ID, type, assignment, guest, arrival/departure, guests, nights, total, occupied, and edit options.

- Be sure to reach out to the guest if the arrival date is close or the deadline is about to expire and no bank transfer payment receipt has been received.
- ❑ Once the payment receipt is received, [register the payment in your PMS](#).
 - ❑ [Send a confirmation to the guest](#).

Refund Procedure

The Front Desk team should follow the property's cancellation and refund policies when processing a refund for reservation cancellations or an unused incidentals deposit. Additionally, other scenarios that may require a guest refund include, but are not limited to, emergencies (early check-outs), overbookings, downgrades, and guest complaints. These cases should be discussed and coordinated with the property management. Refer to [Cancellation Requests](#) for more information.

In Cloudbeds, it is possible [to record an existing refund](#) or to [refund a credit card payment via a connected payment gateway](#). The refund will now show up in the folio as a red number under the 'Credit' section. It is also possible to add reservation notes and transaction notes.

Handling Refunds Checklist:

- Confirm the amount to be refunded and the payment method.
- Inform the guest about refund terms and conditions if any (refunds to the guest's credit card processing time is dependent on the credit or debit card company. On average it takes 5-10 business days).
- Process the refund using the same payment option selected to make the original payment. Every payment method offered by the property should have a separate refund procedure.
 - **Cash refund.**
 - Open the cash drawer and extract the needed amount.
 - Keep the drawer well organized and ensure bills are separated by denomination.
 - [Record the refund in the PMS system](#).
 - Print out the guest folio and kindly ask the guest to sign it in order to confirm that the refund has been received.
 - Count the bills out loud when giving the refund to the guest.
 - **Credit card refund via payment gateway.**
 - [Process the refund through the payment gateway](#).
 - Be sure to confirm the refund transaction was posted to the reservation folio.
 - **Credit card refund via terminal.**
 - Follow the instructions on how to process a refund via terminal.
 - [Record the refund in the PMS system](#).
- Add a note about the refund reasons in the [reservation notes](#) and in the refund transaction if possible.
- Provide the guest with a receipt if applicable.
- Provide the guest with a [printed invoice or send it by email](#).

DATE/TIME	NAME	ROOM	TYPE	NOTES	CREDIT
12/09/2017 13:48	Jimmy Kennel	Dorm 1. Bed A	Credit Card Dorm 1. Bed A	Decided to stay only 1 night instead of 2, but paid full deposit before arrival	(60,00)

Adjustment Procedure

The Front Desk team should know how to process eventual adjustments. The property may need to offer adjustments when it receives a guest complaint, needs to correct the reservation price, or when it is appropriate to offer the guest a discount on rates or any additional items or services.

- Such cases should be discussed and approved by property management.
- Adding adjustment to reservation subtracts a specific amount from guest's debit/charge (what guest owes).
- It should be utilized when the correction needs to be shown in folio and invoice.

Handling Adjustments Checklist:

- Confirm the amount to be adjusted.
- Define if it will be applied to room, taxes, items or services.
- [Add the adjustment to the reservation.](#)
- Add a note about the adjustment reasons in the [reservation notes](#) and in the adjustment transaction if possible.
- Provide the guest with a printed folio [/invoice or send it by email.](#)



- Monitor the rising payment trends in the hospitality industry.
- *Modern travelers rely on mobile devices and often choose the convenience of paying for their goods and services online. Using a payment processor integrated with your Cloudbeds PMS and Booking Engine is a great way to implement seamless online payments.*
- Consider offering alternatives such as Apple Pay, Google Pay or Samsung Pay.
- Clearly state the available payment methods in advance to all guests.
- Counterfeit money is a risk for all properties that accept cash payments at the Front Desk, restaurant, or any other department. Detailed employee training on methods to check for counterfeit currency and fraudulent payment is important to reduce the risk of revenue loss.
- Consider offering alternatives to payment refunds when a credit is owed to a guest, such as a discount, room upgrade, or incidental credit on a future stay.
- The incidental deposit amount varies, but it is recommended to collect an authorization per day or per stay to ensure adequate funds at the time of check out. (In case the guest leaves without checking out at the desk to settle their account).
- Processing payments through a terminal is preferred to prevent chargebacks as the credit card is swiped and noted as card present.

COVID-19 TIPS

- All staff should sanitize hands each time after handling cash.
- Credit card terminals should be disinfected after each use.
 - Most terminals should not be sprayed directly with a cleaning solution to prevent breakdown of the materials. Instead, spray a cloth with disinfectant, and wipe the terminal down.
- Switch to cashless and contactless payment methods in all applicable points of sale.

14 Guest Invoicing

PURPOSE

The guest invoice is a document issued to the guest outlining all the transactions associated with a reservation, including room rates, payments, adjustments, and any incidentals that were charged back to the room. The invoice is usually presented at the beginning of the guest's stay and also at the time of check-out to summarize all balances charged, paid and/or balances due. The invoice serves as a legal agreement between the guest and the hotel.

While invoices are typically presented at the time of check-out, it can also be available digitally in the guest's room (tv or tablet), through their mobile device, emailed upon request, and other methods such as mailed to the customer per request.

A thorough procedure in providing accurate invoices for the guest ensures that documentation is provided and the guest is well aware of all charges, payments & balances.



Guest Invoice Requirements

Hotels provide guests with invoices on paper, by email, or both based on the requirements of local legislation and also dependent on the guest's preference. Also, depending on the applicable regulations, these invoices can be tax invoices or customer receipts. Your PMS system may include the ability to customize the invoice and adjust it to your needs. Alternatively, you can create the preferred template from scratch in a word processor or publishing software app.

Important fields to add to the guest invoice:

- Hotel branding and logo
- Hotel name and contact information (address, phone number, email, website, fax)
- Unique invoice number, invoice date and due date
- Guest full name and contact information (address, phone number, email)
- Total number of guests staying
- Total number of nights and dates of the stay
- Guest's reservation number and room number
- A list of room rates and amenities purchased with descriptions and prices for each including state and local taxes
- A list of payments
- Balance due
- Payment terms and additional information

INVOICE

Ron Burgundy
Reservation Number: 7912731441

Invoice Number	Tax ID	Invoice Date	Payment Due	Total Taxes	\$ 300.00
INV - 1 - 2020	123456789	01/10/2020	06/10/2020	Taxes	\$ 30.00
				Fees	\$ 0.00
				Grand Total	\$ 330.00

Email: sample_invoice@cloudbeds.com | Address 1: Marko rosso AV.
Phone: 5670405687 | City: San Antonio
Country: United States
Province / State: Texas

Balance Due
\$ 0,00

Check-in	Check-Out	Nights	Reservation Dates
01/10/2020	03/10/2020	2	28/09/2020

DATE / TIME	NAME	ROOM	DESCRIPTION	NIGHTS	DEBIT	CREDIT
01/10/2020 - 04/10/2020	Toni Morrison	124	Room Rate - Queen Suite	4	\$ 300.00	-
01/10/2020 - 04/10/2020	Toni Morrison	124	3 x City Tax (10%)	-	\$ 30.00	-
01/10/2020	Toni Morrison	N/A	Credit Card	-	-	\$ 330.00
			Total		\$ 330.00	\$ 330.00

Possible payment options:

- credit card
- PayPal
- bank transfer

In Cloudbeds, you can [adjust the invoice template](#) by uploading the company logo, specifying the invoice index number and default due date, adding tax ID, legal company name and custom text. Also, it is possible to configure the invoice to be generated automatically once the reservation is created.

Providing Guest Invoice Procedure

1. Ensure that the guest contact information and all reservation details are added to the reservation in the PMS system.
 - *In Cloudbeds, they will auto-populate the fields in the invoice.*
2. If necessary, add additional charges to the reservation folio in your PMS system such as mini-bar consumption, restaurant & bar charges, pet fees, airport transfers, early check-in, parking fee, etc. These charges should be itemized by the date incurred.
3. Charge payment and post it in the reservation folio. The payment may include an incidentals deposit to cover additional expenses charged to the room during the guest stay. Refer to [Handling Payments](#) for more information.
4. Generate the invoice in the reservation in the PMS system, print it out, and send it to the guest. If you are using a manual template, make a copy of it and fill it in with the reservation data manually before printing it and sending it by email.
 - *In Cloudbeds, you can easily [generate an invoice in the reservation and email it to the guest](#). The generated invoice is saved in the reservation documents and can be printed out.*

The screenshot displays the Cloudbeds PMS interface for a reservation. At the top, the reservation is confirmed for Sarah Black (131860872936). Key details include: Check-In: 02/10/2020, Check-Out: 04/10/2020, Nights: 2, Reservation date: 30/09/2020, Guests: 1, Group Profile: ABC Company, Allotment Block: ABC Company, and Estimated Arrival Time: Unknown. The source is 'Website / Booking Engine' and the rate plan is 'Base Rate'. A 'SHOW MORE' button is visible below these details.

The 'ACTIONS' menu is open, showing options: 'Email invoice', 'Generate new invoice' (highlighted with a red box and a mouse cursor), and 'Email Folio'. A red arrow points from the 'Generate new invoice' option to the 'DOCUMENTS' section below.

The 'DOCUMENTS' section shows a table of invoices. The table has columns for 'INVOICES', 'FILE NAME', and 'DATE CREATED'. One invoice is listed with ID 69, file name 'Invoice-131860872936_69.pdf', and date '30/09/2020 03:52 PM'. A red arrow points to the 'INVOICES' column header.

INVOICES	FILE NAME	DATE CREATED
69	Invoice-131860872936_69.pdf	30/09/2020 03:52 PM

- It is important to allow the guest to attain their invoice through multiple methods in case they do not want to visit the Front Desk. This may include by email, by mail, and through any available methods such as television/tablet and/or mobile app. Oftentimes the guests check-out by calling the Front Desk in lieu of visiting the desk and should be provided an emailed copy of their invoice during or immediately after the call.
- Often guests who travel together and make one reservation may ask for separate invoices. In this case, the hotel would need to generate a separate invoice listing individual charges for each guest.
 - *In Cloudbeds, with the help of the [Split Folio](#) feature, you can [create several folios](#) in the reservation and move transactions between them. You will also be able to print different folios and to [generate separate invoices](#) based on the folio.*
- This may also apply if the guest is traveling on business and/or another party is paying for their room/tax and the guest is responsible for other charges. If your hotel has documented agreements with business organizations to provide service to their staff and/or clients, guest charges are transferred to be paid by the guest's company or other sponsoring organization. The procedure may differ depending on the agreement with the company and should be clearly stated on the credit card authorization form or hotel voucher. In these cases, the hotel should split the charges according to the agreement and issue separate invoices to the guest and the company.
 - *In Cloudbeds, you can use the [Split Folio](#) feature mentioned above to generate and send a separate invoice. Additionally, the [Groups](#) feature allows to [create a group profile](#), [add a contact](#) person to the profile, to create [allotment blocks](#) with limited availability and custom rates, to [link reservations](#), and to [route booking transactions](#) to the group profile where you can [generate an invoice](#).*

15

Guest Check-out

PURPOSE

The front desk is the guest's first and last point of contact. Check-out is the guest's last impression of the hotel and the last chance for your hotel to gain invaluable guest loyalty. Therefore, the front desk team should ask the guest how they enjoyed their visit and welcome them to stay at the hotel again when they return to the area in the future.

Traditionally, during the check-out, the Front Desk member would settle the bill and ask for the guest room key. Alternatively, you can offer an option of self check-out where the guest would need to drop the key or the keycard into the special box. This can make the whole procedure more efficient and is practical in the case of early or late check-out.



Procedure

1. Greet the guest by name and ask if they are ready to check-out. If so, ask about their stay. If the guest is taking a moment to share his impressions, listen carefully, thank them for providing the feedback
 - **Positive Feedback.** Thank them for their positive feedback. Take a note of it to share with the management later. Provide a business card and encourage the guest to leave a review on your review platforms (Tripadvisor, Booking.com, etc). Some hotels incentive reviews and provide discounts in exchange for reviews.
 - **Negative Feedback.** If the guest is remarkably upset and frustrated, stay friendly and understanding. Depending on the case, there may be a guest recovery plan offered to the guest.
2. Ask if the guest needs a car transfer to get them to their next destination or if you can order a taxi for them. Always try to sell your hotel services first. If the client requests a car transfer, inform them about the procedure and charges, and make the needed arrangements. Add the transportation charge to the reservation folio before the bill is settled. Refer to [Pick-up/Car Transfer Service](#) and [Ordering Taxi](#) for more information.
3. Find the reservation in in the PMS system and check the pending balance. Print out the reservation folio and show it to the guest. Ask if everything is correct and if there are any other charges missing. This is a critical step in the check out process. It is important no charges are missed.
4. If there is a positive balance due, point it out and ask about the preferred method of payment. Refer to [Handling Payments](#) for more information. Collect the payment if required and mark the reservation as Checked-out in the PMS.
5. Provide the guest with a printed invoice or send it by email. Check out [Guest Invoicing](#) SOP for more information.
6. Ask if the guest has already vacated the room and if so, request the key or keycard. If the guest has not yet vacated the room, take this opportunity to extend a friendly reminder to them not to forget any personal belongings, ensuring to empty the safety deposit box. Ask that the guest drop the key/keycard off at the front desk upon departure. Refer to [Guest Room Keys or Door Locks](#) for more information.
7. Ask if the guest needs any assistance with the luggage. Refer to [Storing Guest Luggage](#) for more information.
8. Say goodbye to the guest, thank them for staying at the hotel, wish a safe trip, and invite them to stay at the hotel again when they are back in the area. If it is a repeated or special guest, personalize your approach to make a note of it.

- Print out [Departures Report](#) in the morning or a day before to have a good overview of who will be checking out. Additionally, the [Account Balances Report](#) can be generated for reservations checking out on a particular date. It will help to ensure no one checks out with a balance due.
- Sending a pre-check-out email to the guest can be a great way to remind about the check-out time, pending balance due, and to offer additional services like airport drop-off or car transfer. In Cloudbeds, you can [create an email template](#) and [schedule it](#) to be sent one day prior to the check-out date.
- Obtaining guest opinion, both positive and negative, about their experience will help to identify areas for improvement and highlight areas delivering good results. Having a good reputation management system in place is important. Consider sending a follow-up email with an online survey or using one of the numerous reputation management apps. Cloudbeds integrates with [TrustYou](#), [Hotels Quality](#), [myHotel](#), [GuestRevu](#), [eKomi](#), [Reputize](#), and [HotelSpeaker](#) that can read the reservation data and send out online post departure surveys.
- Remember that your relationship with the guest doesn't end after the check-out. Sending newsletter, follow-up emails, and special offers is a nice way to keep in touch and to encourage your guest to come back.

COVID-19 TIPS

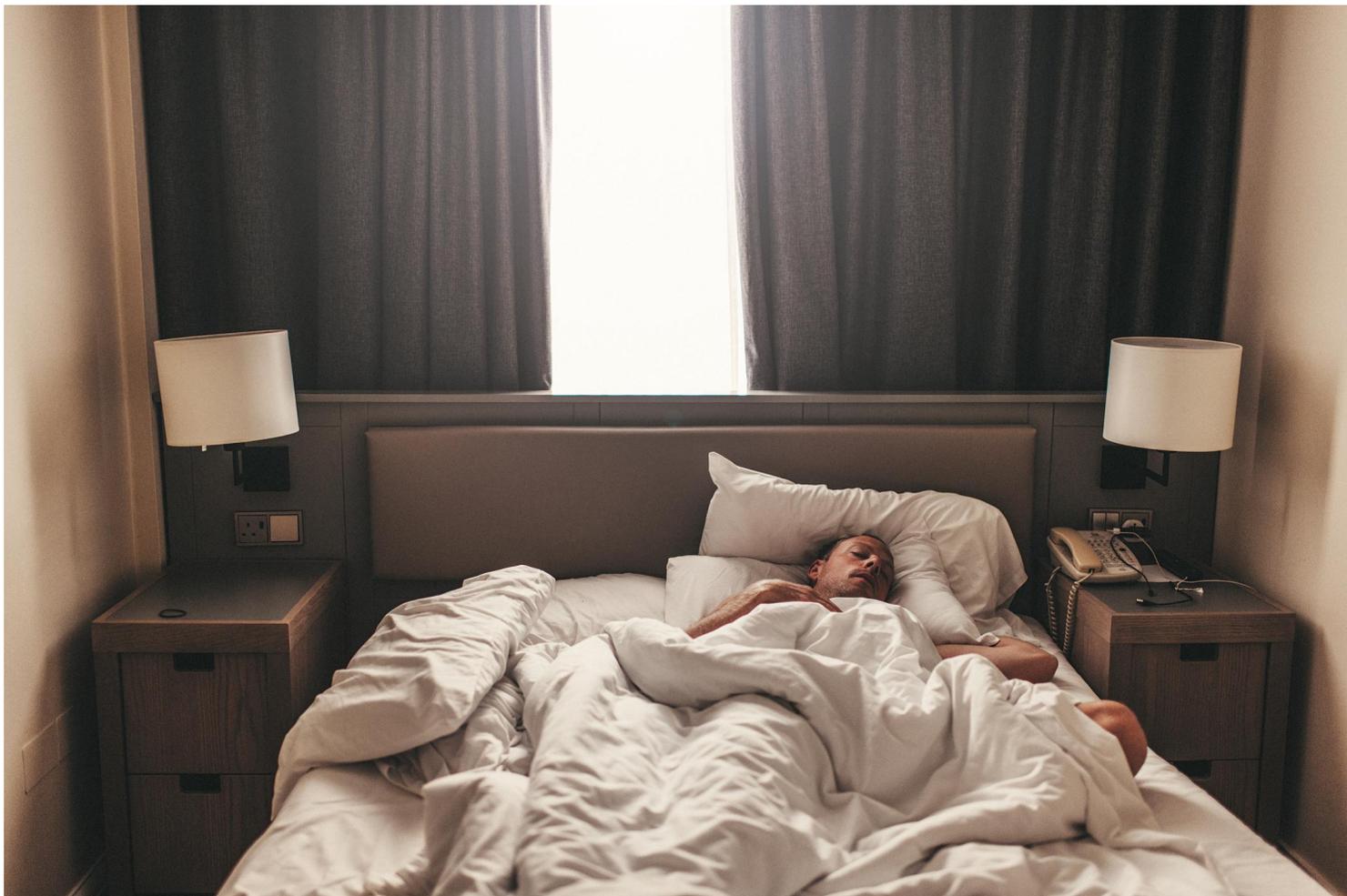
- Front Desk team members should wear face masks and keep physical distancing of 6 feet (1.5 meters) with guests and colleagues.
- The Front Desk area should be clearly marked for appropriate 6 feet (1.5 meters) physical distancing between guests not traveling together.
- All guest touchpoints (pens, devices, countertop contact surfaces, credit card devices) should be disinfected after each guest contact.
- Switching to contactless online or offline check-out is one of the best strategies to reduce human interaction and the risks of exposure to COVID-19. Refer to [Contactless Check-in and Check-out](#) for more information.
- Develop a protocol for addressing guests/visitors that are not wearing a mask and/or social distancing.

16

Early Check-ins and Late Check-outs

PURPOSE

Specified check-in and check-out times are designed to keep the hospitality industry running on schedule. Usually, hotels allow guests to check in after 2-4 pm and to check out before 10-12 am. These rules allow enough time for the Housekeeping team to clean the room and to prepare it for the next arrival. Still, this timing may not be the most convenient for the guests and they would need to get to their rooms earlier or to enjoy their stay longer on the day of departure. The Front Desk team should handle these requests with care following the hotel's policies and trying to provide the best guest experience possible.



Procedure

- If guaranteed early check-in and late check-out is provided according to the hotel policies, offer this option to the guest while handling a direct booking. Check if the room is available on the day before or after the stay to accommodate this option.
- If early check-in and late check-out is requested by the guest before the arrival, inform the guest about your policies and additional charges either pre-arrival or during the time of check-in. Ensure there is availability in the calendar to accommodate this request and the reservation is notated and the appropriate charges are added.
- If a guest arrives earlier than the specified check-in time, locate the reservation in the PMS system and check the calendar.
 - If there is a vacant clean room available, proceed with the check-in.
 - If earlier check-in is not possible, kindly explain to the guest that the room is not ready yet. You may settle the payment and complete the registration. Notify Housekeeping that the guest has arrived to expedite cleaning of the room. Use this moment to anticipate the guest's needs. Kindly offer to store their luggage. Briefly introduce them to the hotel facilities and, depending on the case, suggest a drink or a meal in a cafe/restaurant, invite them take a comfortable seat in the lobby or on the terrace, provide information about hotel services and tours, give recommendations on local places and sightseeing. Finally, confirm the guest's contact phone number to call once the room is ready and also provide the Front Desk contact number.
- If the guest asks about late check-out on the day of departure, inform them about your policies and additional charges. Ensure there is availability in the calendar to accommodate this request. Otherwise, kindly offer to store their luggage.
- Once the request is confirmed, make a note of it in the PMS system. Block the day(s) and add an additional charge to the reservation if applicable.

In Cloudbeds, you can [change the estimated arrival time](#), easily [block dates](#) in the Calendar, [add notes to the reservation](#), [create items](#) and [add them to the reservation folio](#):

John Smith
784515224663

CONFIRMATION PENDING ACTIONS

Check-in	Check-Out	Nights	Reservation date	Guests	Estimated Arrival Time	Source	Rate Plan(s)	BALANCE DUE \$ 100,00
19/09/2020	20/09/2020	1	18/09/2020	1	10:00 AM	Walk-In	Base Rate	

SHOW MORE

Accommodations Folio Guest Details Credit Cards Notes (0) Documents Reservation Activity Email Messages

Active Notes (0)

Archived Notes (0)

John Smith called and requested an earlier Check-in option. Informed about additional changes and blocked the previous night.

SUBMIT NOTE

Arrival & Departure Policy

It is recommended to showcase your Arrival and Departure policy on your website, in your booking engine, in the confirmation email, and on the reservation channels. These are the terms that will be a legally binding obligation between you and the guest in order to guarantee a room stay at your property. A guest must accept your terms when they complete the reservation checkout process and you must provide the services under the terms that you have offered through your website. Below is an example.

Check-In Time: 3 PM

Check-Out Time: 11 AM

Early Check-In: If you wish to begin your stay earlier, we would be happy to welcome you. Early check-ins are based upon availability and may include an additional charge. Complimentary early check-in may be available but not guaranteed on the day of arrival.

- Check-In between 1 PM and 3 PM: 20% of the room rate
- Check-In between 11 AM and 1 PM: 50% of the room rate
- Check-In before 11 AM: Full room rate

Late Check-Out: Late check-out is based on availability and may include an additional charge.

- Check-Out between 11 AM and 2 PM: 20% of the room rate
- Check-Out between 2 PM and 6 PM: 50% of the room rate
- Check-Out after 6 PM: Full room rate

In Cloudbeds, there is a [configuration for normal check-in and check-out time](#). There is also an option to configure a late check-out charge. Alternatively, a more detailed policy can be documented in Terms & Conditions. This information will be showcased in mybookings booking engine and in the confirmation reservation email.

Deposit Cancellation Policy Terms & Conditions **Arrival & Departure**

What is your normal check-in time?*

What is your normal check-out time?*

Do you offer a late check-out?

No Yes

Note: This is just an information field that doesn't check nor update your availability

What is your late check-out time?*

Do you charge a fixed late-check out charge or as a percentage of the room night?

Percentage Fixed

Enter the cost below.

\$ 40,00

- It is also important to document late check-in policy and clearly communicate the policy to your guest. Usually, if the reservation is guaranteed with a credit card and/or a deposit payment, the hotel will hold the room until 7:00 am the morning following the scheduled arrival. If the hotel does not offer 24-hour reception, the guest needs to contact the hotel to arrange for a late check-in between 10 pm and 7 am. Non-guaranteed reservations with no arrival time and no re-confirmation from the guest are canceled at 6 pm or another specified time on the day of arrival to release the availability for last-minute reservations and walk-ins.
- If early check-in and late check-out requests are frequent at your property, consider being proactive and offering this service in a pre-stay email as an additional upsell. Letting the guest know you are looking forward to their stay and sending useful tips and information about their stay would create a good first impression.
- Early check-in and late check-outs can also be seen as a “value-add” and provided in a special package for the customers to book on the hotel’s website.
- If the guest is requesting a late-check out during their stay, it is common practice for the Front Desk staff to confirm late check-out requests on the evening prior to the check-out date. During this time the Front Desk staff would check occupancy for the following day and also whether another reservation is due to check into the room that the current guest is inquiring of a late check out for. It would be up to the staff discretion to offer the late check-out and also whether it will be complimentary or at an additional charge.
- It is also recommended practice for management to advise the Front Desk team if late check-outs are allowed on a daily basis so they can plan for last minute guest requests based on occupancy levels.

17

Contactless Check-in and Checkout

PURPOSE

According to OpenKey, a provider of smartphone check-in/mobile key technology, 64% of travelers want to use their smartphone as a room key. When it comes to the check-in process, guests love anything that makes it easier on them.

Online check-in can be enabled through your website or via a dedicated mobile app that integrates with your PMS. These mobile apps can do much more than allow users the ability to check in or check out without visiting the front desk but they also allow guests book a future stay, order room service from a mobile phone, and communicate with the property in real time.

Alternatively, a key lockbox or a key safe can be a simple solution to allow the guests to check in and check out independently. These are small storage devices that can be attached to a door handle or wall. A key is stored in the container that can be opened with a code inputted manually.



Procedure

Parking/Entering the Building

1. Inform guests of parking arrangements before arrival so that they know which parking area is located close to the entrance closest to their room. Give recommendations on how to get to the hotel from the airport or train station using public transport. This can be done in the confirmation or pre-arrival email. Include maps, if needed.
2. Provide self-serve throughout the entire parking process or until the point of payment. If possible, permit guests to pay online through an app and/or onsite at a pay terminal.
3. Ensure that all main entrances are fully stocked with hand-sanitizing stations and complimentary masks for guests arriving from parking areas.

Check-in via App Integration

1. Once the reservation is confirmed send the guest a notification to inform them of the pre-checkin service. This can be sent via your PMS or check-in app. If you are already using a contactless guest check-in such as Lynx or Roommatik, it can be integrated with Cloudbeds to send an email once the reservation is made.
2. Send a reminder for guests to check-in before arrival 48 hours ahead of stay. If you are using Cloudbeds, you can create [an email template](#) and [schedule custom emails](#) directly within your PMS. Most connected pre-check in apps will have automated emails within the app that you can schedule at specific times.
3. If applicable, ask if the guest needs any assistance with the luggage via the check-in app or email. If the guest does need assistance with the luggage, arrange the time of luggage pick-up and follow them to their accommodation.
4. It is customary, once you receive an alert that the guest has arrived via the check-in app, send a message to welcome them. This is also an opportunity to promote upsell through your guest communications app. Inform the guest of all the additional services such as hotel amenities, dining options, recommended activities and other offerings such as late check out etc.

Check-out via App Integration

1. Prior to the guest departure, schedule an alert with your check-in/upsell app to ask if the guest needs a car transfer to get them to their next destination or if you can order a taxi for them. Always try to sell your hotel services first. If the client requests a car transfer, inform them about the procedure and charges, and make the needed arrangements.
2. Add the transportation charge to the reservation folio before the bill is settled if not automatically transferred with your app. Refer to [Pick-up/Car Transfer Service](#) and [Ordering Taxi](#) for more information.
3. If applicable, ask if the guest needs any assistance with the luggage via the check-in app or email. If the guest does need assistance with the luggage, arrange the time of luggage pick-up and follow them to their arranged transport.
4. Provide the guest with an invoice by email. There is also an option to generate a separate invoice for each guest or bill the company. Check out [Guest Invoicing](#) SOP for more information.
5. Once the check-out time has passed the keycode/QR Code will automatically become disabled and the guest will not be able to enter the room. If the guest forgets something in the accommodation and alerts you through the app or email, temporarily reactivate their keycode/QR code from your mobile device or desktop to allow them to enter the accommodation once more. Once you see they have successfully entered the room, disable the access code/QR Code once more.
6. If the guest has not yet vacated the room, you can reach out to them by phone, app, or email. Take this opportunity to extend a friendly reminder to them not to forget any personal belongings, ensuring to empty the safety deposit box.
7. It is recommended to send an email the day of check out to ask about their stay. If you can, always try to respond to the guest.
8. Alert housekeeping that the guest has left the accommodation so the room can be cleaned. For example, Lynx will send automatic alerts to your housekeeping staff.

Check In via Kiosk

1. Once the reservation is confirmed, send the guest a notification to inform them of the pre-checkin service. This can be sent via your PMS or Kiosk app. If you are already using a contactless guest check-in such as Roommatik, it can be integrated with Cloudbeds to send an email once the reservation is made.

2. If applicable, ask if the guest needs any assistance with the luggage via the Kiosk app or email. If the guest does need assistance with the luggage, arrange the time of luggage pick-up and follow them to their accommodation.
3. If the guest is checking in at a kiosk in the lobby, greet them from behind the desk and let them know you are available should they have any issues or questions regarding self check in. Another option is providing a Front Desk phone number to call if the guests are having issues while using the kiosk.
4. It is customary, once you receive an alert that the guest has arrived via the check in app, send a message to welcome them. This is also an opportunity to promote upsell through your guest communications app. Inform guests of all the additional services such as room service. Many self check in kiosks, also offer upsell capabilities such as room upgrades and late check-out.

Check Out via Kiosk

1. Prior to the guest departure, schedule an alert with your check-in/upsell app to ask if the guest needs a car transfer to get them to their next destination or if you can order a taxi for them. Always try to sell your hotel services first. If the client requests a car transfer, inform them about the procedure and charges, and make the needed arrangements. Add the transportation charge to the reservation folio before the bill is settled if not automatically transferred with your app.
2. If applicable, ask if the guest needs any assistance with the luggage via the check-in app or email. If the guest does need assistance with the luggage, arrange the time of luggage pick-up and follow them to their arranged transport.
3. Provide the guest with an invoice by email. There is also an option to generate a separate invoice for each guest or bill the company.
4. If the guest has not yet vacated the room, you can reach out to them by phone, app, or email. Take this opportunity to extend a friendly reminder to them not to forget any personal belongings, ensuring to empty the safety deposit box.
5. It is recommended to send an email the day of check out to ask about their stay. If you can, always try to respond to the guest.
6. If it is a repeated or special guest, personalize your approach to make a note of it.
7. Alert housekeeping that the guest has left the accommodation so the room can be cleaned if your kiosk/PMS does not automatically do so.

Online/Self Check-in Benefits

Online/self check-in is also a great way to improve guest communication, help your marketing and loyalty efforts, and promote upsells and other services. Guests can learn more about your property, be served exclusive offers or be upsold on other amenities while they negotiate the online check-in process. Lastly, hotels that improve the check-in experience by making it quicker and more convenient will most likely earn high praise from their guests and better reviews.

Here are the main reasons you should consider online/self check-in at your hotel:

- Streamlines the check-in/check out process
- Improves the guest experience
- Guest Convenience
- Eliminates lines during check-in/check-out
- Allows to accommodate guest arrivals and departures happening outside of normal working hours of your Front Desk
- Improves guest communication
- Showcases your website and other parts of your property
- Increase sales potential
- Better reviews
- Will save money over time than key/keycard locks
- Reduces labor costs as check-in/check-out is the main function of the Front Desk team

Cloudbeds integrates with the following pre-check-in app partners: [Civitfun](#), [Experience Hotel](#), [GuestJoy](#), [Hostellers](#), [LocalCave](#), [Lynx](#), [Operto](#), [Roomatik](#), [Trilyo](#), [Welcome PickUps](#), and [Wishbox](#).

- Some hotels opt to offer a special promotion if they book through the app to promote the contactless form of check-in. Promotions may include free parking, complimentary breakfast, special offers on their next stay, or a percentage discount.
- Please note that some OTAs may not be compatible with the contactless guest check-in apps as they do not provide the guest contact information that is necessary for pre-check-in prior to the guests' stay. It is recommended to ask the OTA partners if they are compatible.
- If you decide to use a check-in app or kiosk, it is important to pick one of those which can be integrated with your PMS system. To view current Cloudbeds pre-check-in integration partners, check Cloudbeds integrations page and apply all relevant filters such as region and language. Here you can always find a current list of our integration partners, both live and future.

COVID-19 TIPS

- Offering a contactless check-in and check-out experience will help you meet the fluid market trends and requirements as a result of COVID.
- When following the guest to the room or assisting with the luggage, ensure that you are never within 6 feet (1.5 meters) from the guest.
- Sanitize kiosks and door knobs after each guest arrival when feasible.
- Place sanitizing stations in shared building entrances/communal areas.

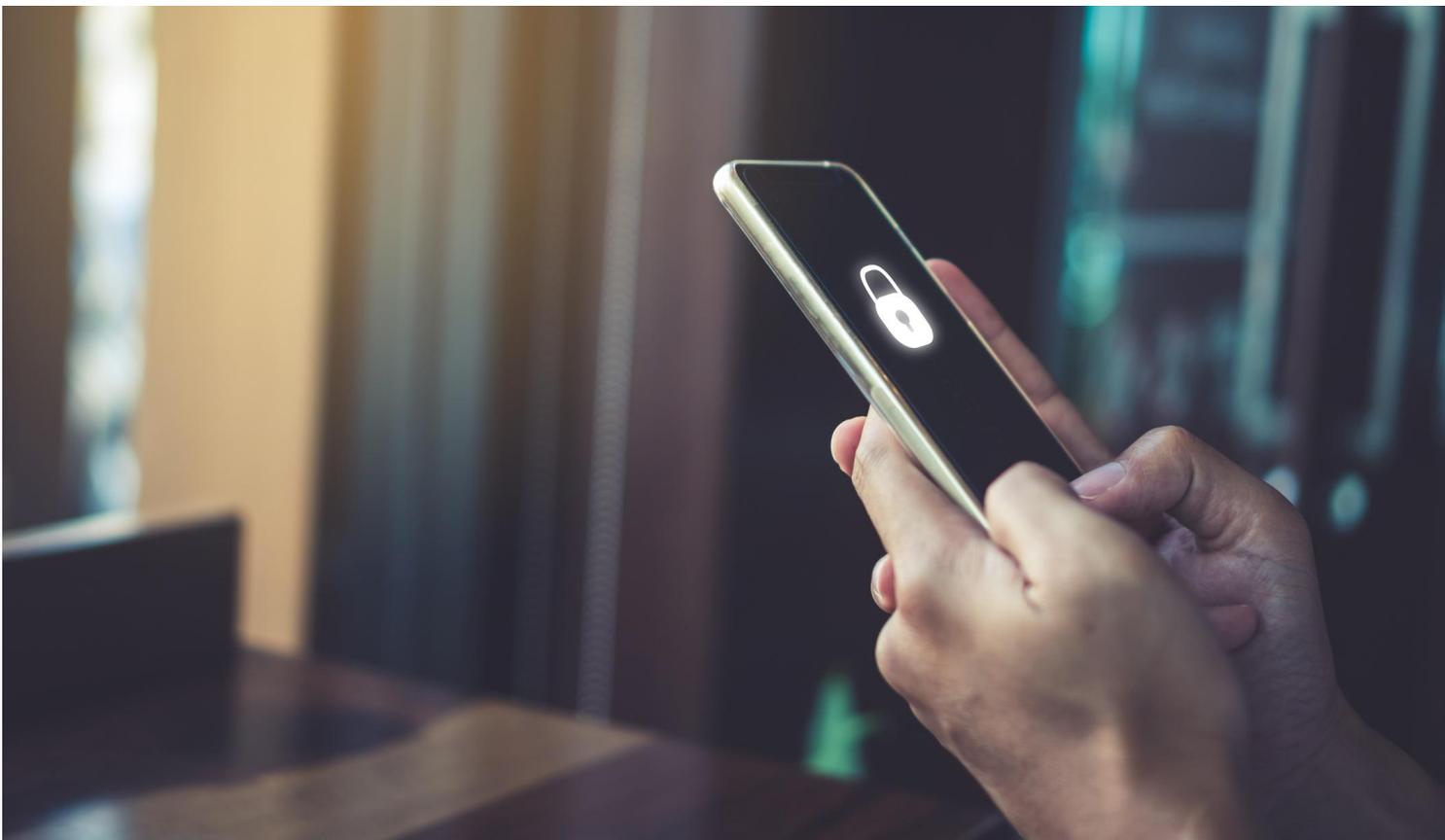
18

Guest Room Keys or Door Locks

PURPOSE

Safety and security have always been important in the hospitality industry. Comprehensive key management is necessary to ensure the right employees and the right guests have access to the right rooms. The front desk is responsible for establishing the identity of the guests and handling guest room keys or door locks. In small and medium-sized properties, the front desk can also be responsible for distributing and signing the keys among other employees such as housekeeping or maintenance.

These procedures may significantly differ depending on the hotel door locking system. Nowadays, electronic door locks are widely used in hotels as a practical alternative to traditional mechanic locks. Those locks can be open with a key card, a PIN code, or an app. The hotel door locking system can be managed by software that can be integrated with your PMS system.



Key Types

These are the main key types used in hotels:

1. **Emergency Key** can open all doors double-lock in the hotel, including guest rooms, offices, storage rooms. This key should be stored in a separate sealed lockbox and used in the case of an emergency by the management.
2. **Master Key** can open single-lock doors on the floor or in a particular area. These may include floor supervisors master keys, housekeeping master key, maintenance area master key, etc. There should be several sets available depending on the number of team members.
3. **Guest Room Key** is used by the guests to open the rooms. There should be several sets available depending on the room size and the number of team members.

Door Locking Systems Types

There are many solutions available at the market and each hotel should choose the most suitable option based on its budget and needs.

1. **Mechanical door locks** are traditional locks that can have different lock cylinder mechanisms (e.g. reversible or spanner keys). They are affordable, easy to install, and simple to use. However, keys can be easily lost or copied and this solution has no extra functions apart from locking and unlocking.
2. **Mechatronic locking systems** combine mechanical and electronic components. They include the locking cylinders, programmable keys, special devices for programming, and management software. The power source is located within the key card so an unstable source of energy and the internet should not be an issue. Key cards can be granted access for a defined period. It is possible to delete the lost keys from the system and to program the replacement keys.
3. **Digital locking systems** are versatile and provide a wide range of functions and features. For example, it is possible to set a specific time for the door to lock or unlock automatically and reprogram the cards as many times as needed. Digital locks may also integrate the whole process with the PMS system. Digital locks can help you meet the market trends that began to occur in early 2020 with consumers looking for a contactless experience. It's important to note this system needs electricity to operate.

The most common types include:

- RFID locking systems
- Code lock with PIN
- Lock with a chip card
- Lock with a smartphone control

Providing Guests Keys Procedure

1. Ensure that the hotel has full documentation about the identity of the person checking in and staying in the hotel. Make a copy of the passport or other picture ID.
2. After picking the keys or programming the key cards, lock the key box, or log out from the key machine or door lock software to prevent security breaches.
3. Ideally, the number of keys provided per room would match the number of guests staying in the room. If extra keys are given, you may choose to require a security deposit on the key(s) or by making notes on the reservation.
4. When giving keys to the guests during the registration or during the stay, the guest's name and room number should not be communicated aloud if there are other people who can hear it, nor should the room number/hotel be written anywhere on the key itself. If the key is lost outside of the hotel and found by someone else, they could use the key to gain access to the hotel.
5. If the keys are magnetic, advise the guest at check-in to keep the key away from credit cards or any other item that can demagnetize the key card.
6. Make a record of each key movement in the designated log book.
7. Collect the key during the checkout. If you see a guest who is leaving the hotel and hasn't passed by the front desk, kindly ask if he has returned the key.

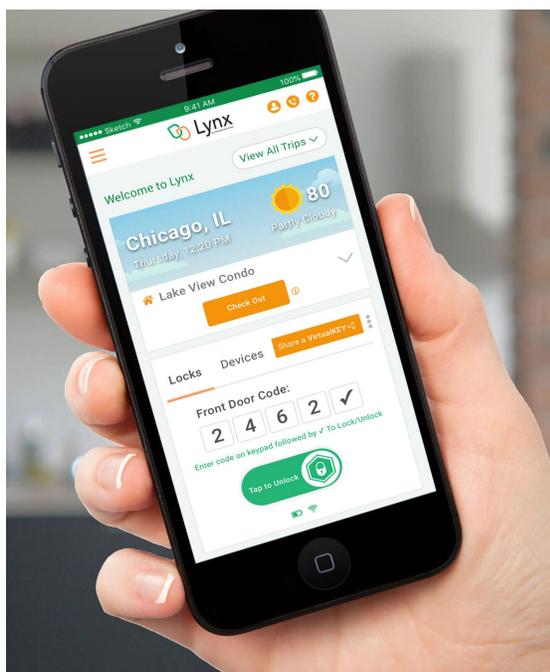
Lost Keys and Lockout Procedure

1. If the room key is lost, provide the guest with the new key. Record the lost key in the dedicated register and inform the management. Mechatronic or digital key cards should be deleted from the system straight away.
2. Make a record of each key movement in the designated log book.
3. You should always establish the guest's identity before returning or issuing the new keys to the guest. If you do not clearly remember the guest, ask for a photo ID and compare it to the name on the reservation in Cloudbeds. Kindly explain to the guest that you need to follow this procedure to ensure their safety and security. Thank them for their patience and understanding.
4. If the guest does not have an ID on hand or was locked out of the room, ask a couple of clarifying questions and double-check the passport scan or copy available on file or attached to the guest profile. If necessary, accompany the guest to the room to confirm the identity.

5. If the guest refused to provide his ID and to be escorted to the room, inform the manager straight away and ask him for assistance in this situation.
6. Never give keys to others claiming to have the guest's permission to enter the room unless the guest gave a clear verbal or written authorization to the front desk team beforehand. Keys can also be given to guests who are added as additional guests or share-withs.

Contactless Key/Key Code Procedure (Using Lynx)

1. Ensure that the hotel has full documentation about the identity of the person checking in and staying in the hotel. This information will be transferred from Cloudbeds to Lynx upon receiving the reservation.
2. Ask the guest to verify their identity using the industry standard for verifying guest identities for contactless check-ins. You may choose an integration that allows submission of personal identification documents (IDs, passports, visas, etc) over an encrypted platform to ensure authenticity and security.
3. You can decide when the guest will receive the access code. A unique code is generated for each guest using the last four digits of the guest phone number.



- You can customize this code.
- This code will only activate at the predetermined check-in time and will automatically deactivate at the check-out time.
- You can temporarily unlock an accommodation for emergencies by logging into your Lynx app and controlling access remotely.

Key Control System Policy

This policy should be clearly documented and followed by all staff members:

- All keys are kept in a key cabinet and emergency key box in the back office on the wall.
- All storage room doors and closets are locked.
- All keys or key cards should not have any tags, names, or numbers. For security purposes, nothing should refer to the hotel name or to the room number.
- Metal keys should be labeled with a numeric code and color according to the internal Key Location Identification Sheet. This code should not correspond to the actual location or room. Each department can have its own color code.
- Every authorized employee should have a separate user account to access the key machine or key management software.
- Keys should never leave the property in the possession of a staff member.
- All keys must be checked-in and out by all employees and guests without exception at the front desk. It should be logged in the dedicated *Key Movement Sheet* which is used on a daily basis. The sheets should be filed by date for one month. All sheets should be kept in a close reach in the back office. After one month they can be removed and archived.
- Keys should never be left on carts, in guest rooms, or anywhere in the open.
- Only designated team members should access occupied guest rooms. Those include front desk team members, housekeeping staff, and room attendants.
- Hotel employees who come across a guest claiming to be locked out of their room should direct them to the front desk to verify their identity before receiving another room key. Access to the room should never be given without verifying the guest's identity.
- Hotel employees who find lost or left keys should place them in their pockets not to be mixed with other personal keys and return them to the front desk and to the manager.
- If a metal key is lost, room locks should be exchanged or rotated. There should be a log with all lock swaps and rekeyings. The number of keys issued and the date they were issued should always be recorded.
- If a master key or an emergency key is lost, it should be reported to the management so they can decide if the lock should be re-keyed.

- Having a comprehensive key control system policy and procedure is paramount for hotel security and safety. Remember, whenever key and security issues are being considered, you must take care of it and demonstrate proactive problem ownership.
- Cloudbeds is integrated with a number of door lock applications that offer digital lock system solutions. With their help you can automate the check-in process and room access, provide keyless access to the rooms and create an enriching experience for the guests. The integration with Cloudbeds has the ability to synchronize reservations and set up the automatic email scheduling with the necessary check-in information. It is recommended to choose one of the partner apps: [Flexipass](#), [KAS Lock Software](#), [Lynx](#), [STAYmyway](#) and [Operto](#). You may also refer to our [Cloudbeds Integrations page](#) to sort integrations by categories (i.e. door locks, guest communication, revenue management) and region to find which integrations are available to your specific region.

COVID-19 TIPS

- Mechanic keys and keycards should be disinfected after each guest and before returning them back into the key inventory.
- Switching to a digital locking system is one of the best strategies to reduce human interaction and the risks of exposure to COVID-19.

TEMPLATES

→ Key Location Identification Sheet Template

Get the Template

→ Key Movement Sheet Template

Get the Template

GUEST REQUESTS

INTRODUCTION

Guest request management is an important part of the overall guest experience as it bolsters the customer service provided by the hotel. Guests may need help and assistance with a variety of things not necessarily related to their rooms. How to get to the hotel? How to make the most of their vacation or business trip? Which restaurants to go to in the area? Where to find the best local tour?

The Front Office team should have all the necessary knowledge and tools to manage all kinds of guest requests and anticipate the guests needs, providing the needed additional products and services offered by the hotel. This not only contributes into the overall guest experience, but creates additional revenue opportunities for the hotel.

Front Office SOP Templates Available

Download, customize and print your own SOPs to fit your property.



[Get the SOP Templates](#)

19 Room Moves

PURPOSE

A room move may be required on a number of occasions. In most cases, it is not a planned action so it is important to show ownership, attention to detail, and time efficiency in order to keep the guest satisfied. Also, a room move should be well-coordinated by the Front Desk team to ensure clear communication between different teams and to avoid issues. A room move can be done in the presence of the guest (live move) or when the guest is absent (dead move).



Room Move Reasons

- A room move can be planned in advance if the reservation is split. In this case, the front desk team should coordinate it in advance, taking the check-in and check-out time into consideration. The new room should be clean and ready for the guest to move.
- The regular practice in hospitality is to offer a guest a new room if the guest reports any kind of defect or an outage in the room that cannot be fixed immediately (e.g. water leakage in the bathroom, TV, or A/C not working, etc).
- The guest expresses a dislike about room design, smell, or size.
- After checking-in, the guest would like to be moved into a better room.
- After checking-in, the guest discovers that there was a mistake and he was assigned a wrong room type or one of his requests has not been accommodated (e.g. twin bed, non-smoking room, view preference, etc).
- The room is requested to be out of service by the maintenance team.

Procedure

1. Listen to the guest's request carefully and acknowledge their concerns.
2. If the room move is requested due to a dislike, different expectations, or other preferences, use this opportunity to upsell a better room to the guest instead of offering a free upgrade. Describe another available room to the guest and explain its differences if any. If possible, try to involve the guest into the decision-making process and offer several options. Offer to show the new room to the guest before making the change.
3. In the event that the guest is displeased with the cleanliness/functionality of the room or allocation, apologize for the inconvenience caused by the room defects or for the mistake with the room allocation. If the room move is requested because of dislikes or different expectations, take note of the guest's preferences.
4. If applicable to the nature of the request, try to allocate a new room as close to the current one as possible. This will make the room move procedure smoother and quicker.
5. If there are no similar rooms available or you need to improve the guest's satisfaction, consider upgrading the guest to a better room. This should be in line with the hotel/property's policies and approved by the manager. Refer to Room Allocation, Upgrade and Downgrade for more information.
6. Send a responsible team member to deliver the keys and to help with the room move at the requested time. This person should check the room and all possible areas to make sure that nothing was left behind. Minibar consumptions should be reported to the front desk team who will apply the charges to the new room. Luggage assistance should be provided if needed.
7. Make the necessary changes in your PMS system. This may mean changing the room type or splitting the existing reservation.
8. Document all the changes and requests in the reservation notes.
9. Make sure the housekeeping department is informed.
10. If applicable, make sure the engineering department is informed about the outage/defect and is working on the resolution.
11. Check if the guest has made any room service and laundry service requests to communicate the new room number with the corresponding team.
12. As a courtesy, give a follow-up call to the guest later to ensure everything is according to his liking. If needed, discuss the possible service recovery with the manager.

- If the guest reports a technical issue or an outage but a room move is not possible because the hotel is fully booked, do your best to fix the issue as soon as possible. Also, consider offering different perks and compliments as an apology for the inconveniences caused:
 - A written apology from the general manager
 - Free bottle of wine
 - Rewards points
 - Free complimentary breakfast or meal
 - Discounts or upgrades for future visits
 - Free additional products or services offered by the hotel/property
- It is important to document all remarks, preferences, complaints, and services offered in the notes in the PMS system. This will allow you to have an updated guest profile and history in order to make the right decision related to guest management. Please note that there are different types of notes in Cloudbeds: [reservation notes](#), [guest profile notes](#), [group profile notes](#), and [allotment block notes](#). The last two are available when the Group Housing feature is enabled.
- In Cloudbeds, you can refer to the [Room Move Report](#) to track the room transfers of specific guests who are still staying in the property or will stay in the future.
- Establishing a procedure for regular room check-ups and maintenance will significantly reduce defects and technical issues. Refer to Preventive Maintenance (this SOP is not available at this moment) for more information.

20 Package/Parcel/Message Delivery

PURPOSE

Apart from operational tasks, receiving information or packages and delivering it to the right guest or person is an important responsibility of the front desk team. It is a common procedure for the guest to place an order or a parcel to be delivered to the hotel while they are staying there. Also, the guest may leave a message or an item at the front desk to be picked up by a third-party person. The Front Desk team should handle in a friendly and professional way ensuring the guest and hotel safety.



Procedure

1. If the guest informs you that they are awaiting a parcel or a delivery, make a note of it in the [reservation notes](#) in your PMS system.
2. If the guest leaves an item or a message to be picked up by a third party person at the front desk, make a record of it in the *Parcel/Message Delivery Logbook* and add a corresponding [reservation note](#) in PMS. Tag the item with the name of the guest, the room number, the name of the recipient, and store it at the frontdesk.
3. When an item or a message is delivered, locate the reservation in the PMS by searching by the guest name, ensuring this person is currently staying at the hotel or due to arrive. Check the reservation notes to see if there are any mentions of the expected delivery.
4. Third-party couriers are not allowed to deliver the item to the guest room for security purposes. The item will be accepted and registered at the front desk and delivered to the guest internally.
5. All messages and items delivered for guests whose name is not mentioned in your PMS system, for a current or upcoming stay, should be not accepted.
6. Suspicious parcels should be not accepted and security should be notified immediately.
7. Record all items received for guests in the *Parcel/Message Delivery Logbook*. Mention the date and time it is received, who received it, the name of the courier company, the recipient, and the description of the item. Add a corresponding reservation note in your PMS system.
8. Tag the item with the guest name and the room number.
9. Reach out to the guest by phone or email and inform them about the message or item received. Depending on the case, it can either be delivered to their room or it can be picked up at the front desk.
10. If the item is picked up at the front desk, verification of ID needs to be completed to ensure the item belongs to the person.
11. If the item is received for the guest who is due to arrive, store it at the front desk and at the storage room to be handed in during the check-in. Ensure the item is properly tagged before storing and create a reservation note.

12. If the item needs to be delivered to the guest room, it is important to follow this procedure when entering a stayover room:
 - If you see a “Do Not Disturb” sign hanging on the door, bring the package back to the Front Desk and try delivering it another time.
 - Knock the door twice and announce that it is a parcel delivery.
 - If you do not hear a reply, enter the room and announce “parcel delivery” once again.
 - Leave the package in the room with a note.
 - If you encounter the guest in the room after announcing yourself three times, greet them and inform them about the package.
 - Show the guest where the “Do Not Disturb” sign is so they would not be disturbed again in the future.
13. Once delivered to the guest, record the delivery date and time in the logbook and ask the guest to add his signature.

TEMPLATES

→ Parcel/Message Delivery Logbook Template

The logbook should be checked on each shift and/or daily to ensure that the customer has picked up the item or is aware that the item is awaiting for delivery or pick-up.

[Get the Template](#)

- When leaving a note or voicemail for the customer to notify them of the delivery, it is also a great opportunity for the team to add an additional note to personalize the interaction such as wishing them a wonderful remainder of their stay or asking how their stay has been so far. Always provide a phone number in case of any further requests.
- If the item that is dropped off is something sensitive or valuable such as a credit card, cash, gift card, ID etc., ensure to not only conceal the item (in an envelope, etc.) but also to lock it up in a safe place.

COVID-19 TIPS

- Sanitizing all incoming packages using UV technology upon arrival is one of the easiest and effective ways to enhance hygiene and safety at the hotel.
- “Knock and drop” contactless delivery should be used when bringing parcels to the guest rooms however the guest should always be informed prior to the delivery to prevent any guest inconveniences.
- Employees should sanitize hands before and after handling parcels and packages.

21 Pick-up/Car Transfer Service

PURPOSE

Many hotels provide transport services to their guests. While top hotels may offer different kinds of transportation, including driver courtesy coaches, limousine service, staff transportation, and valet parking, small to medium properties can arrange pick-up or car transfer service for their guests. Mostly these services are provided to arriving or departing guests from the hotel to the airport or train station. Also, they are essential for remote hotels and resorts where public transportation is not available or hard to use. A transportation service is usually coordinated by the Front Desk team who confirms the availability of the drivers and schedules the transfers.



Procedure

1. Car transfer can be requested by a guest who is due to arrive or by a guest who is currently staying at the hotel. It can be also requested by a tour operator or a coordinator for a group of guests. Handle these requests in a friendly way and try to accommodate all of the guest wishes.
2. Make a note of relevant information, such as pick up date and time, pick up place and destination, and the number of passengers. Ensure transportation service is available before confirming it with the guest.
3. If the car transfer cannot be accommodated by you at the requested time, try to book it with a third-party car transfer service.
4. If the car transfer is not available at the requested time, apologies and explain the situation to the guest. Offer to move the pick-up time to a later hour if applicable or to double-check the availability later. Give recommendations on how to get to the destination and offer to book a taxi. In any case, try to avoid saying no to the guest and always accommodate their request when possible.
5. Inform the guest about the costs and payment method and collect all the necessary information. If the guest will be arriving by plane or train, ask for a flight or train number. If the request is done by phone or in person, repeat the details once again ensuring everything is correct.
6. Record the request in the *Car Transfer Schedule*.
7. Make a note of it in the [reservation notes](#) in your PMS system. Add the transportation fee to the reservation folio.
 - *In Cloudbeds, you can create items and [post them in the reservation folio](#). It is also possible to add notes to the transaction.*
8. Send out a confirmation email to the guest with car transfer details and ask the guest to inform you if anything changes on their end.
9. Forward the *Car Transfer Schedule* to the driver. If the guest is arriving by plane, check the flight status several times during the day and before pick-up to ensure there are no delays.

- If you are a small property, having a driver may not be an available option. Still, you can create an additional value for your guests by offering transportation services. In this case, you can forward your car transfer requests to a third party. Alternatively, another staff member or the property owner can pick up the guests.
- If you are forwarding your transportation requests to a third party, ensure this is a trusted car transfer service provider that will provide a good service to your guests. It is a good strategy to establish partnerships and to ask the driver to pick up your guests with your hotel logo sign. Depending on the agreement, you can negotiate a special offer or discount for your guests or earn a commission.

COVID-19 TIPS

- Inform your guests about the safety rules in the confirmation email: all riders should wear a mask, the riders should sit at the back if possible, the driver will open a car window if possible to increase the ventilation in the car, etc.
- Hotel drivers should be provided with and wear a face mask, gloves, and have a personal hand sanitizer. They should also sanitize all frequently touched surfaces after each ride.
- If you are forwarding your transportation requests to a third party, check on their hygiene and safety standards to ensure your guests will have a safe experience.
- When possible, use a plexiglass or plastic divider to separate staff/driver from guests.

TEMPLATES

→ Car Transfer Schedule Template

This sheet should be maintained for each date and shared with the driver or another team member picking up the guests.

[Get the Template](#)

→ Key Movement Sheet Template

[Get the Template](#)

22 Ordering a Taxi

PURPOSE

International and even local guests may ask for assistance with ordering a taxi. These requests should be handled with care and professionalism as it is one of the ways to create a positive impression and elevate the guest experience. The front desk team should have a list of trusted local taxi providers.



Procedure

1. Listen to the guest's request and make a note of the following information. Repeat it once again to the guest ensuring everything is correct.
 - Guest name
 - Guest contact number (optional)
 - Room number
 - Number of passengers/number of cars
 - Destination
 - Date and time
 - Car category preference (usually taxi providers offer different car categories: e.g. economy, comfort, luxury)
 - Will a return be necessary? If so, request the time and meeting location for return pick-up
2. If your hotel offers a pick-up/car transfer service, kindly ask the guest if they would like to use your service instead of a private taxi company.
3. Contact one of the trusted local taxi providers and request a taxi.
4. Call the guest or leave a voice message informing that the taxi has been arranged for the requested date and time. Provide exact information about the price of the trip and payment method if available. Advise the guest to be ready at the front desk at this time as a long waiting time may cost extra.
5. Record the taxi order request and arrangement including the taxi company name, taxi plate number, and the driver's contact number in the reservation notes in your PMS or the corresponding logbook.
6. If the guest is not yet at the front desk once the taxi arrives, call the guest and inform them that the taxi has arrived.
7. Escort the guest to the taxi if needed.

- Prepare the list of trusted local taxi providers offering a different kind of car categories (e.g. economy, comfort, luxury). Just in case, it is recommendable to find a taxi provider offering long-distance rides to other cities and regions.
- If your guests often make taxi booking requests, consider making deals and arrangements with local taxi providers or drivers to earn a commission or get priorities.
- The taxi industry has been significantly transformed by applications that can be downloaded from Apple Store or Google Play market and installed on a smartphone. These applications are easy to use, available in different languages, and can be linked to the credit card. Instead of ordering the taxi on behalf of the guest, consider recommending using Uber or another similar taxi app popular in your country or local area.
- It is important to take note of the taxi information for the guest in case they leave items behind in the taxi to contact the company to potentially retrieve the items.

23 Upselling Additional Services and Products

PURPOSE

Guests are the lifeblood of the hospitality industry. While providing the accommodation is the main product in any hotel, it is not the only thing your guests may need. For example, if they are booking a vacation destination, it is likely they will be also looking for activities & tours in the area.

Offering relevant products and services, both during the booking process and during the stay, is a great way to enhance your guests' stay, to add value to their hotel experiences, and to generate additional revenue via third-party commissions and partnerships in addition to your property's services. The hospitality industry has only started taking advantage of offering additional products and services. With endless technologies to effectively upsell and cross-sell throughout the guest's purchase journey, this is an invaluable strategy to boost revenue.



Hotel Products and Services List

The hospitality industry has an abundance of options when it comes to choosing which extra products and services to offer to the guests. Hotel management should analyze its guest profiles and do their best to meet their needs and expectations. It is recommended to create a list of all items offered by the hotel, categorize them, and add all the description and prices. This list should be added to the staff training and manual along with other procedures. Make this information readily available in the lobby and on the website. A separate SOP may be needed for some of the products or services.

- **Pick-up/ car transfer service/ airport shuffle** (check [Pick-up/Car Transfer Service](#) for more information)
- **Food & beverage** (e.g. bottled water and soft drink, coffee and tea, room bar, adding box of chocolates, an extra bottle of wine or champagne, fruits to the room to the room upon arrival)
- **Meals** (e.g. breakfast buffet, lunch, special dining, half and full board)
- **Spa facilities** (e.g. fitness center, swimming pool, sauna, massage, beauty salon)
- **Cleaning services** (e.g. extra cleaning in the room, ironing and laundry)
- **Room enhancement** (e.g. fresh flowers, extra bed, baby bed, toddler bathtub)
- **Leisure activities** (e.g. car rental, bicycle rental, kayal/boat rental, yoga classes , culinary classes, events for kids)
- **Tours and trips**
- **Business facilities** (conference rooms, meeting and banquet facilities)
- **Event organization** (weddings, celebrations, conferences)
- **Parking** (car, extra car, large vehicle such as an RV or commercial rigs)
- **Early check-in and late check-out** (check [Early Check-ins and Late Check-outs](#) for more information)

In Cloudbeds, it is possible to [create the list of all items and categories](#) which can be [added to the reservation](#) or to a [house account](#) when the transaction is not related to a reservation. [Stock Inventory](#) module allows to set the inventory quantity for the products, receive “low stock” alerts when the minimum stock quantity is reached, set threshold to automatically suspend sales of a special product, monitor stock and items sold in the reports.

Guest Profiles

Not every guest falls into a tidy set of categories but more likely than not, different groups of guests will share characteristics that you can identify (e.g. adventure seeker, romantic getaway, family vacation, business trip, etc.).

- **Casual travelers.** They typically travel once or twice per year based on their company's vacation policy in the company of friends or family. Their vacation time is a time to unwind, relax, and explore. Casual travelers like to hit all the destination's main attractions, so when they are in a place they try to get everything they can out of it. They'll likely enjoy guided tours and other group activities. They usually do a fair amount of research and know what to expect when they arrive at their destination.
- **Backpackers.** These travelers are price conscious and only seek out the basics when it comes to accommodations. They tend to go on several trips a year and will spend more time traveling, typically to many different locations. They are interested in getting to know their destination like a local: to taste authentic food, stay in local neighborhoods, and experience the nightlife.
- **Business travelers.** These guests are less price-sensitive as they are usually not footing the bill. They have tight schedules and value efficiency. Though they are not there to visit the local sites, they will be interested in learning about good restaurants both for personal and business purposes and they will need local transport and other business service information, such as the nearest FedEx, Kinkos, etc.
- **Couples.** They usually seek unique and romantic experiences to celebrate their honeymoon, wedding anniversary, or simply spend a nice relaxed time together. They are not in a hurry to see all the attractions but they would be interested in private tours, classes, workshops, spa packages, or special dining.
- **Families with children.** These guests usually travel well prepared and on a fairly strict budget. They look to make the most of their trip so organized trips and activities suitable for children are generally a high priority. Local attractions like theme parks and tourist activities are usually the highlight of family trips. Alternatively, some family vacations consist of pure relaxation on a beach or at the pool. Restaurants and other attractions that offer family discounts are appreciated.
- **Luxury travelers.** They are focused on getting the most out of their trip at a high standard of comfort. Luxury travelers will often plan their trip and have a general idea of what they'd like to do. They often seek out private and group tours, popular tourist attractions, as well as more rare types of activities that are off the beaten path. Exceptional service and a willingness to help whenever they have a question are essential.

Cross-selling

It is important that the products and services are offered to the right guests and the right time. The hotel may use all or several of the approaches listed below. It is also smart to pick different cross-selling techniques for different items.

- **Providing information before the booking.** Writing about your incredible spa facilities, family-friendly restaurant, or authentic culinary classes on the hotel website and in social media is a great way to attract more visitors to your website. A traveler who was looking for a culinary class in the area may decide to stay at your hotel because you are the one offering this experience. It is also important to list all facilities on the website and on the booking channels. Many guests search and select their destinations based on the available facilities like parking, conference rooms, or airport shuttle.
- **Room enhancement and extra services during the booking process.** Giving an option to buy an extra bottle of wine or flowers bouquet, book a guided tour or request a car transfer will inform your guests about your offerings and will give them a chance to make their stay more special.
 - The front desk should use a soft approach to promote these services while handling the direct booking requests.
 - Add extra products and services on the booking channels like Booking.com or Expedia.
 - *In Cloudbeds, you can [create add-ons](#) which are cross-selled right after the guest completes a reservation in mybooking.*

ORDER	STATUS	ITEM	ADD-ON NAME	AVAILABLE	CHARGE TYPE	MAX QTY	
	<input checked="" type="checkbox"/>	Airport Transfer	Airport Pick-up	Show	Per Reservation	N/A	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Breakfast	Breakfast	Show	Per Guest Per Night	N/A	<input type="checkbox"/>

ENHANCE YOUR STAY, SELECT FROM ADD-ONS AND EXTRAS
Add-ons are on a per-room basis, please select items individually for each room listed below.

ROOM 1 - STANDARD SINGLE

Item	Price	
Standard Single - Breakfast	USD 10.00	<input checked="" type="checkbox"/> SELECT
Availability:		
Standard Single - Airport Pick-up	USD 30.00	<input checked="" type="checkbox"/> SELECT

UPDATE TOTAL

- **Sending a pre-stay email.** Letting the guest know you are looking forward to their stay and sending useful tips and information about their stay would create a good first impression. It is a common practice to use these emails to cross-sell the hotel extras or to offer a room upsell.
 - In Cloudbeds, [create an email template](#) and [schedule it](#) to be sent to the guest several days before arrival.
 - Alternatively, use one of the upsell & concierge apps integrated in Cloudbeds. The integration provides different features, including sending pre-check-in upsell emails to the guests and posting the transactions of the purchased items in the reservation folio. Cloudbeds integrates with [Trilyo](#), [Guesthub](#), [GuestJoy](#), [Oakly](#), [UpsellGuru](#), and [The Percentage Upsell App](#).
- **Offering options during the check-in.**
- **Displaying booklets in the room and at the front desk.** The printed promotional material with catchy photos and highlights can be freely available in the guest rooms, at the reception and at the lounge area.

- Consider marketing and offering some of the services, classes and events to outside visitors as well. This is a great way to utilize the potential of your facilities, to generate more revenue and attract more attention to your property. The hotel fitness center, spa center, restaurant and bar should open for all visitors. You can rent your conference rooms, meeting or banquet hall for an event or a celebration. Your special day trips, guided tours, yoga and culinary classes can be offered for everyone too.
- Consider including the price of some of the products and services in the room rate to create a better all-in-one experience for the guests. It is a common practice to have breakfast included in the rate in many hotels. Resorts often offer half board, full board or all inclusive. Furthermore, if your hotel is loved by families with kids it is a great idea to hire a full time animator who will be entertaining them during the day.
- Creating a local guide for your guests is one of the great ways to recommend your own services and tours. Refer to [Recommendations on Sightseeing and Entertainment](#) for more information.

COVID-19 TIPS

- Remove all printed materials (booklets, city maps, etc.) normally displayed and freely available at the Front Desk, lounge area and guest rooms. Use other methods mentioned above to cross-sell your services and products (providing information on the website, selling add-ons on the online booking engine and booking channels, sending a pre-stay email, providing information during check-in). Printed materials can be provided to the guest on request or added to the individual 'Welcome Kit'.
- Following the restaurant practices, place QR codes in the guest rooms and at the Front Desk to provide information about the products and services provided by the hotel. These barcodes can be easily read by a smartphone's camera.
- Some services and products need to be redesigned and reorganized to ensure the guest safety and to minimize the exposure to the virus. Inform the guests about your new cleaning and disinfection protocols, health screening, physical distancing and personal protection rules.

24 Recommendations on Sightseeing and Entertainment

PURPOSE

Giving recommendations on sightseeing and entertainment is a great way to elevate your guests' experience, to gain their loyalty, and to upsell your own product and services. This is also a great opportunity to partner with local tourist attractions/tourist agencies so that you can offer their services/activities and receive a commission. The front desk team and everyone involved in the interaction with the guests should be knowledgeable about local attractions and all services offered by the hotel to be ready to give the right recommendations.



Procedure

1. If the guest asks for a recommendation on sightseeing or entertainment, assist them as best as possible in a welcoming and friendly manner. On the other hand, be proactive and ask if the guest needs any tips or recommendations during the check-in or during another interaction.
2. Try to analyze the type of guest reaching out to you and tailor your recommendations to fit their needs. Families would probably be looking for kids friendly restaurants and theme parks while backpackers would be interested in authentic local places and experiences.
3. If the hotel offers services, products, guided tours, or trips, that fit the guest's wishes and needs, make it your first recommendation. This is a great opportunity to promote and upsell your own services. Provide the guest with the booklets if available and explain the highlights of the experience. Recommend the hotel's restaurant, cafe, bar or a spa center.
4. When you recommend outside places, try to be helpful by listing them on a note, pointing them out on the map, and providing the guest with booklets and business cards if available.
5. Offer to make a booking of the tour or reserve a table in a restaurant on behalf of the guest. Again, frequent recommendations provide opportunities for your property to develop beneficial partnerships with local businesses.

Creating Local Guide

Being proactive and providing all the local information to the guest before they ask is a great way to create additional value for them and build a closer relationship. It is always possible to get printed materials from a tourist office or directly from local places. Still, creating your own local guide offers many more opportunities as you can publish it online to attract more visitors to your website, send it to your guests beforehand, and simply put all of your own favorite places together, including your own services/products and partnerships to address the interests of your guests. Things to consider when creating a guide:

1. **Identify your target market and guest profiles.** Analyze the type of guests who usually stay at your property, what they like to do and how you can help them.
2. **Create a basic framework and list all the best places you would like to recommend.** You can add your personal comments and mention how far away your property is from your recommendations and easy ways to get there. Add your own products and services to the list too.

- Food (breakfast, lunch, dinner, dessert, snack, markets)
- Drinks (coffee, breweries, pubs, bars)
- Sights (museums and exhibitions, major places of interests, hidden gems, local hotspots)
- Activities (indoor and outdoor activities, nightlife, classes and workshops, fairs and events)
- Practical information and business services (nearest shops, laundry, banks, ATMs, post offices, taxi providers, public transport, local sim cards)
- Packing list and essential travel tips
- Maps

3. **Put your recommendations together** into your local guide based on your target audience and decide **how to share and distribute it**. You can use [Cloudbeds local guide templates](#) to build your own guide.

- **On your website.** Localized content will help you gain organic traffic and make your property more visible to potential travelers. You may want to add your guide to your website as a blog post or give it its own page. Make sure to include an introduction and conclusion to the guide as well as your contact information.
- **As a Printable PDF sent to the guests.** They can print the guide before they leave for their trip or download it onto their phones so they can reference it on the go. A downloadable guide will work offline so guests can reference it if they are away from a WiFi connection.
- **In print at your property.** While an online local guide will help you attract potential guests to your property, a printed guide will be helpful to guests staying on-site. Guests will appreciate having a portable guide they can take with them and refer to as they're out exploring. The booklets can be placed in each room, added to the welcome kit, or displayed at the front office.

- Reach out to the local tourist office to get city maps and booklets to share with your guests.
- Visit your favorite local places (restaurants, cafes, bars, clubs, museums, exhibitions) and ask for booklets or business cards. They will be happy to share their promotional material and be recommended by you. Ask if you can place your booklets at their place.
- If your guests are often interested in some activities (e.g. local spa centers, day trips, or guided tours), consider partnering with local places, tour guides, and organizations and forwarding your guests to them. This is a great way to ensure your guests are getting a good service. Depending on the agreement, you can negotiate a special offer or discount for your guests or earn a commission.
- Digitizing your local guide as much as possible will be welcomed by many modern travelers who use their smartphones to get around. Consider sending a link to a list of your favorite places on Google Maps instead of providing a printed city map. Google Maps will not only help to get to the needed destination easily but will give the chance to check out the pictures and reviews. Recommend useful local apps like Uber to grab a taxi or local train company app to buy a train ticket. Add hyperlinks to the guide so the guest can visit the needed websites to get more information. This is also an ideal opportunity to improve your SEO for your website.

Useful Cloudbeds System Guides:

CALENDAR AND DASHBOARD

- [Dashboard Overview](#)
- [Calendar Overview](#)
- [How to Create and Edit Room Hold](#)
- [Why Can't I Drag and Drop Reservations In The Calendar?](#)
- [Auto Room Assignment Overview](#)
- [How to Assign a Room to an Unassigned Reservation](#)
- [How to Block Room Availability](#)

RESERVATIONS

- [How to Make a New Reservation Using the Simple View Option](#)
- [How to Make a New Reservation Using the Split View Option](#)
- [How to Make a Direct Reservation When There Are Restrictions On Rate Intervals](#)
- [How to Add Minimum/Maximum Length of Stay to Your Base Rates](#)
- [Adding, Viewing and Archiving Reservation Notes](#)

RESERVATION MODIFICATIONS

- [How to Edit Check-in/Check-out Dates and Room Rates](#)
- [How to Edit Reservation](#)
- [How to Add and Edit Guests on a Reservation](#)
- [How to Check-in/Check-out the Guest\(s\)](#)
- [How to Move a Reservation to Another Room Type Without Changing the Price](#)
- [How to Edit the Credit Card Details?](#)
- [How to Change the Reservation Source](#)
- [How to Adjust Charge/Add Adjustment to a Reservation](#)
- [How to Cancel/Modify Reservations Made on OTAs](#)
- [Why Is a Room Unassigned After a Channel Modification?](#)
- [How to Cancel/Modify Reservations Made on OTAs](#)
- [How to Add the Estimated Arrival Time](#)

OVERBOOKINGS

- [Overbookings Features in Cloudbeds](#)
- [How to Handle Last Minute Overbookings: Emergency Process](#)
- [Overbookings Caused by Room Blocks or Courtesy Holds](#)
- [Overbookings Caused by Manually Adding a Third Party Reservation](#)
- [Overbookings Caused by Moving a Reservation Between Accommodation Types](#)
- [Overbookings Caused by Making Changes with Quantity of Rooms](#)
- [Overbookings Caused by Simultaneous Bookings](#)

GUEST AND REGISTRATION CARDS

- [Guests Tab Overview](#)
- [Guest Status Overview](#)
- [How to Create and Manage Registration Cards](#)
- [How to Create and Edit Custom Fields](#)
- [How to Add and Edit Guests on a Reservation](#)

EMAIL CONFIGURATION

- [Email Templates](#)
- [Sending Email from Reservation](#)
- [Cloudbeds' GDPR and Data Privacy Commitments](#)

ITEMS, SERVICES AND CATEGORIES

- [Items & Categories Overview](#)
- [How to Add Items to Reservations](#)
- [Stock Inventory](#)

INVOICING AND RESERVATION FOLIO

- [Invoicing - How to manage and use](#)
- [Viewing Existing Invoices On Reservation Page](#)
- [Can I create an Invoice for each guest?](#)
- [Invoicing - FAQ & Common Issues](#)
- [Split Folio in Reservation](#)
- [Split Folio Configuration](#)

POLICIES

- [Policies Overview](#)
- [How to Set a Guest Deposit](#)
- [Cancellation Policy](#)
- [Updating Arrival & Departure Information](#)

PAYMENT OPTIONS

- [Adding and archiving Note from Reservation](#)
- [Cash Drawer - Everything You Need to Know](#)
- [Cashier Report](#)
- [Cloudbeds Payments - Everything you need to know](#)
- [Cloudbeds Payments - How to Authorize Incidentals](#)
- [Custom Payment Methods](#)
- [Groups - Adding a Credit Card to a Group Profile](#)
- [Groups - Group Folios. Adding and Routing Transactions to Group Folio](#)
- [Groups - What is Groups Add-on and How to Get Started](#)
- [Guests Tab Overview](#)
- [How to Add / Post Payment to Reservation as a Record \(Without Using PaymentGateway Processing\)](#)
- [How to Add / Post Refund to Reservation as a Record \(Without Using Payment GatewayProcessing\)](#)
- [How to Add and Use PayPal As a Payment Option](#)
- [How to add Cash Payments to Reservations](#)
- [How to Add Credit Card Details to a Reservation](#)
- [How to Adjust Charge / Add Adjustment to a Reservation](#)
- [How to Authorize a Card Through Payment Gateway](#)
- [How to Grant and Set Up the Credit Card Viewing Password \(Property Owner\)](#)
- [How to Process Payment in Cloudbeds](#)
- [How to Process Payment Through Payment Gateway](#)
- [How to Process Refund Through Payment Gateway](#)
- [How to Set a Guest Deposit](#)
- [How to set up a deposit policy](#)
- [How to set up Bank Transfer as a payment option in your property](#)
- [How to Set Up Bank Transfer Payments](#)
- [How to set up Credit Card as a payment option in your property](#)
- [How to Set Up Credit Card Viewing Password \(Property Staff\)](#)
- [How to set up Payment Processing on myfrontdesk](#)
- [How to Set Up the Credit Card Payment Option](#)
- [Invoicing - How to generate and download invoices from reservations](#)
- [Multi-Currency - How to Setup, Edit or Deactivate Foreign Currencies](#)
- [Payment Allocation Overview](#)
- [Payment Processing Gateways Currently Supported](#)
- [Payment Processing Overview](#)
- [Payment Processing Report](#)
- [Payment Processing Setup](#)
- [Setting Payment Options for OTAs and Mybookings](#)
- [Split Folio Configuration](#)
- [Split Folio in Reservation](#)
- [Viewing Credit Card Details: All You Need to Know](#)

ADVANCED FEATURES

- [Groups](#)
- [House Account](#)
- [Cash Drawer](#)
- [Payment Processing](#)
- [Cloudbeds Payments](#)
- [Add-ons](#)

REPORTS

- [Arrivals Report](#)
- [Departures Report](#)
- [In-House Report](#)
- [Invoices Report](#)
- [Account Balances Report](#)
- [Cashier Report](#)
- [Payment Processing Report](#)

BOOKING ENGINE AND CHANNEL DISTRIBUTION

- [Mybookings Settings Overview](#)
- [How to Redirect Your Guests to a Particular Room Type and/or Rate Plan in Mybookings?](#)
- [Distribution Channel Closeouts](#)
- [How to Change the Allotment of Rooms Sent to Distribution Channels](#)

GENERAL SYSTEM CONFIGURATION

- [System Notification Preferences](#)
- [Apps Integrated with Cloudbeds](#)

Useful Cloudbeds Articles:

- [10 Types of Hotel Guests: Examples for Building your Guest Personas](#)
- [A New Reality: The Contactless Guest Experience](#)
- [4 Email Templates that Build Better Guest Relationships](#)
- [How to Attract and Manage Large Group Business](#)
- [How to Make a Local Guide for your Guests](#)

Related SOPs:

- [Guest Registration and Check-In](#)
- [Group Reservation](#)
- [Group Check-ins](#)
- [Guest Check-out](#)
- [Guest Invoicing](#)
- [Upselling Additional Services and Products](#)
- [Cancellation Requests](#)

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If you would like to get more information about Cloudbeds products, request a free demo and get in touch with one of our market managers [here](#). Your demo will include a custom walkthrough of Cloudbeds catered to your property's unique needs. Cheers to more reservations and happier guests!

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