BookPEI

User Manual

Revision 2010.04.28

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Getting Started with BookPEI

Creating a BookPEI Account

An account is required to access BookPEI. To set up a new account for BookPEI, contact technical support to begin the account creation process. Please see the *Contact Technical Support* section of this document for contact options.

Logging into Your BookPEI Account

To log into your BookPEI account, go to http://www.bookpei.com/ and enter your username and password in the fields provided. Click login and you will be taken to the starting screen for BookPEI. If you are logging in for the first time, you will be presented with the BookPEI terms and conditions. If you accept the terms, choose "Yes" and click "Okay". If you do not accept the terms, you will still be allowed to use BookPEI but will be asked to review the terms and conditions each time you log into BookPEI.

If you have forgotten your username or password, you can use the username and password retrieval function located on the BookPEI login page. The link "Forgot username and/or password" is located underneath the login fields. If you have any other difficulties accessing your BookPEI account, you are encouraged to contact technical support. Please see the *Contacting Technical Support* section of this document for contact options.

Using the BookPEI Home page

The BookPEI Home page will be the first page you see when you log into the system. It provides several views that help to summarize what is happening in your property. Along the top of the screen is the Main Navigation. Under the navigation is the Reservation Search field. Along the left side of the screen are the Announcements and Updates sections. Along the center and right side of the screen is the Calendar Overview. Each of these elements provides different information about your property and your BookPEI account.

Main Navigation

The Main Navigation is used to move through the BookPEI environment, and it remains persistent throughout all operations. It contains options to move to each of the major sections of BookPEI. Each of those sections is discussed in greater detail throughout this document. Just above the Main Navigation are the current date, the property being managed, and the "Logout" button. Clicking the "Logout" button will end your BookPEI session.

Reservation Search

The Reservation Search field allows you to search for an existing reservation. You can search for a reservation by entering a customer's name or reservation confirmation number. For more information on reservations, see the *Managing Reservations* portion of this document.

Announcements

The Announcements section contains important announcements from TourismPEI related to the BookPEI system. The section is hidden when there are no current announcements to display.

Newest Reservations

The Newest Reservations section contains a list of the latest reservations made through an external online source (like the TourismPEI website). Only reservations made through an external source (like the TourismPEI website) are shown in Newest Reservations. Reservations made in the BookPEI backend are not included. You can click on the customer name to see the details of the reservation. The Newest Reservation section will contain up to five new reservations by default, but can be expanded to show all new reservations by clicking the "More" button at the bottom of the container. The Newest Reservations section will update automatically every 10 minutes if the BookPEI home page is left open. For more information on reservations, see the *Managing Reservations* portion of this document.

Arriving Today

The Arriving Today section contains a list of the customers that are arriving on the current date. You can click on the customer name to see the details of the reservation. The Arriving Today section will contain up to five arriving today reservations by default, but can be expanded to show all arriving today reservations by click the "More" button at the bottom of the container. For more information on reservations, see the *Managing Reservations* portion of this document.

Calendar Overview

The Calendar Overview section shows information about your property on a weekly, monthly, and annual level. You can move through each calendar view by clicking on the "Weekly", "Monthly", and "Annually" options present just above the calendar.

The weekly view shows all of the units and their availability for a single week, starting on today's date. You can move forward or backward by a single day or week by using the "Previous and Next" buttons above the calendar. The double-arrow moves the calendar forward of backward by one week, whereas the single-arrow moves the calendar forward or backward by one day. You can also move to any day of the year by using the "Jump to Date" controls located just below the "Previous and Next" buttons.

Along the left side of the calendar is a list of the units currently entered into your account. Beside each unit will be seven days of unit-level information. The information displayed beside the unit name will depend on which unit view you have selected. By default, the "Booking View" is selected, with the other views being "Online Status View" and "Best Deals View".

Weekly Calendar Booking View

When viewing units with the "Booking View" active, you will be presented with reservation specific information. Days that are not currently reserved will be shown with rates and a clickable "BOOK" option. Clicking on the "BOOK" option will allow you to begin a reservation with that unit and date selected by default. See the *Adding a Reservation* portion of this document for more details. Dates that currently contain a reservation will display the name of the guest booked into that room. Clicking on the guest

name will provide you the details of that reservation. Units that do not have rate or availability information entered will be listed as "Not available". To set room rates or availability, refer to the *Managing Units* portion of this document.

Weekly Calendar Online Status View

When viewing units with the "Online Status View" active, you will be presented with the online availability of each unit. Clicking on the "Change" option will allow you to change the status of the room. For more information on room availability, refer to the *Managing Units* portion of this document.

Weekly Calendar Best Deals View

When viewing units with the "Best Deals View" active, you will be presented with unit rates for only those units with Best Deals set. The original and discounted rates will be presented. For more information of Best Deals, refer to the *Managing Units* portion of this document.

The monthly view shows the total number of booked nights and the total number available nights per day for an entire month. You can move forward or backward by a single month by using the "Previous and Next" buttons above the calendar. The number of booked nights is found by counting all of the reservations in all of your units for a single day. The total number of available nights is found by counting all of the available nights in all of your units for a single day. You can click on any day to load the weekly calendar view starting with that date.

The annual view shows the total number of booked nights and the total number of available nights per month for an entire year. You can move forward or backward by a single year by using the "Previous and Next" buttons above the calendar. The number of booked nights is found by counting all of the reservations in all of your units for a single month. The total number of available nights is found by counting all of the available nights in all of your units for a single month. You can click on any month to load the monthly calendar for the selected month.

Setting Up or Updating Your BookPEI Account

The primary purpose of the BookPEI system is to allow online accommodation reservations to be taken. In order for a customer to make an online booking, your account must have a properly configured inventory of units. Each unit must have a basic description, rates to be charged, and when it will be available. In general terms, following the steps listed below will help ensure that your inventory is available for booking.

1. Add new units – See the *Adding a New Unit* portion of this document
2. Update unit details – See the *Editing a Unit's Details* portion of this document
3. Update unit rates – See the *Editing a Unit's Rates* portion of this document
4. Update unit availability – See the *Editing a Unit's Availability* portion of this document
5. Update cancellation policy – See the *Managing General Property Information* section of this document

When these steps are completed and up-to-date with the latest information, your online inventory can be searched and booked through the BookPEI system and the TourismPEI website (and/or your own website if you are using the BookPEI Search API).

The Online Booking Process

Once your inventory is set up and online, you will be able to accept reservations from a BookPEI compatible online source (like the TourismPEI website). A brief description of the reservation process is described below.

1. The guest makes a booking on the TourismPEI website, entering a valid credit card and accepting both the general terms of booking and your cancellation policy. More information on setting your cancellation policy can be found in the *Managing General Property* information section of this document.
2. A confirmation number is generated and provided to the customer.
3. An email detailing the reservation is sent to the customer and to the email address listed in your BookPEI account settings. If your BookPEI account is set to receive text messaging alerts, you will receive a text message alerting you to the booking.
4. If a deposit is required, you must log into the BookPEI system and look up the reservation using the customer name or confirmation number. The credit card to be charged will be listed in the reservation summary. More information on searching for a reservation can be found in the *Searching for Reservation* section of this document.
5. If any corrections or additional follow-ups are required to complete the reservation, the customer's contact information is available in the reservation summary.

Managing Units

In BookPEI, accommodation information is entered as individual elements called **units**. Common examples of units are a single hotel room, a single cottage, or a single room in a bed and breakfast. Because the unit is the core inventory item of the BookPEI system, nearly all transactions in BookPEI require that at least one unit be entered into the system.

Adding a New Unit

To add a new unit, complete the following steps:

1. Click on the "Units" tab located at the top of the BookPEI interface. You will be taken to the "Manage Units" page.
2. Click on the "Add a New Unit" option near the top of the page. You will be taken to the "Add New Unit" page.
3. Fill out the fields presented on the "Add New Unit" page. A detailed description of each field is listed below.
4. When you are finished entering the information about the new unit, click "Add New Unit" at the bottom of the page. You will be taken back to the "Manage Units page and you should see your new unit in the list presented.
5. Although the new unit has now been added to your inventory in BookPEI, it will not have any prices or online availability associated with it. It is recommended that you proceed to "Edit a Unit's Rates" and "Edit a Unit's Availability" in order to complete the unit's setup. If you wish to add a photo to your unit, proceed to the "Edit a Unit's Photo" section.

Description of Unit Details

When adding or editing a unit, you will be asked to enter information about the unit. Here is a list of the fields currently available.

- **General Information**

  - Name – This text is the name of the unit that will appear in the BookPEI backend reservation searches. It is not the name presented to the public.
  - Name to appear on website – This text is the name of the unit that will appear to the public on the TourismPEI website or through the BookPEI Online Booking API.
  - Website, if different than Main Account Website – This is the website you would like displayed for this unit if you require a different website than the one entered into your main account.
  - Non-smoking in this unit – Check "Yes" if you want this unit to be non-smoking. Check "No" if you wish to allow smoking in this unit.
  - Description – This text is the description of the unit that you would like the public to see. HTML code is not allowed.
  - Cancellation Policy, if different than Main Account Policy – This text is the cancellation policy for this unit if you require a different cancellation policy than the one entered into your main account. HTML code is not allowed.

- o   Notes for Visitor Information Centre Staff – This text contains notes that only VIC staff can access through their information systems.

- **Booking Guidelines**

  - o   Posted Rates Are Based on this Many Guests – The number of guests that the posted price for this unit will be based upon. For example, if a hotel room price is based upon double occupancy (two guests), than this number would be two
  - o   Maximum Occupancy – The maximum number of guests that can fit into this unit.
  - o   Minimum Booking – The minimum number of days that this unit must be occupied by a single reservation. Customers will only be able to make a booking to this unit that is equal to or greater than the minimum number of booking days. For example, if the minimum booking days are set to five, than the customer would be unable to book it for four days.
  - o   Weekly Booking Only – Whether or not this unit requires a booking of exactly seven days.
  - o   Weekly Bookings Start Day (if applicable) – This option works only if "Weekly Bookings Only" is selected. The day of the week that the weekly booking is to begin. For example, if you choose Saturday, than guests looking for a week-long booking starting on Tuesday will not be able book that unit.
  - o   Weekly Booking Day 8-13 Options (if applicable) – This option works only if "Weekly Bookings Only" is selected. This selection will tell the system what to present guests if they wish to add an eighth (or more) day to your weekly booking. The "Charge the daily rate for that date" option will allow an eighth (or more) day and will charge the guest a rate based upon the daily rate entered for this unit. The "Divide the weekly rate by 7" option will allow for an eighth (or more) day and will charge the guest a rate based upon the weekly rate divided by seven. The last option "Day 8 not available, weekly bookings only" will not allow for an eighth (or more) day for this unit. The guest must make bookings that are in perfect week increments.
  - o   Allow this Unit to be Included in Packages – From time-to-time, TourismPEI will promote packages online. This option needs to be checked if you wish to allow your units to be included in the packaging system. This feature requires the creation of a package for your property by TourismPEI, so will have no immediate visible effect.

- **Bed Information**

  - o   Select the number of beds in the unit based upon the options provided. Having more than one type of bed selected is allowed. This information will be presented to the customer.

- **Amenities**

  - o   Choose "Yes" or "No" to set the availability of each amenity in the list for the unit. This information will be presented to the customer.

Editing a Unit's Details

To edit a unit's properties, complete the following steps:

1. Click on the "Units" tab located at the top of the BookPEI interface. You will be taken to the "Manage Units" page.
2. Select the "Edit Unit Details" option. You will be taken to the "Unit Selection" page.
3. Select the unit that you would like to modify. You will be taken to the "Edit Unit Details" page.
4. Fill out or change the fields presented on the "Edit Details" page. A detailed description of each field is listed in the "Adding a New Unit" section of this document.
5. When you are finished entering or changing the information about the unit, click "Update Unit" at the bottom of the page. You will be taken back to the "Manage Units.

Editing a Unit's Photo

To edit a unit's photo, complete the following steps:

1. Click on the "Unit Types" tab located at the top of the BookPEI interface. You will be taken to the "Manage Unit Types" page.
2. Select the "Edit Unit Type Photos" option. You will be taken to the "Unit Selection" page.
3. Select the unit that you would like to manage photos for. You will be taken to the "Edit Unit Type Photo" page.
4. If you have an image already added for the unit you selected, you will see "View Current Photo". Click this option if you wish to view the image currently associated with the selected unit. If no image has been found for the unit, no image will be present. In both cases beside the image space, there will be an option labeled "Add Photo".
5. Click the "Add Photo" button to add a new image to your unit. The image you are adding will overwrite any existing images associated with the current unit.
6. Choose "Browse to File" and browse to the image you would like to use on your local computer. The image must be JPEG, GIF, or PNG and less than 100MB in size. Click okay when you have located the image you would like to use.
7. A resized version of the image will appear in the preview area of the image uploader. The public will see exactly what is shown in the preview area. If you are satisfied with the image, click the "Upload File" option located above the preview.
8. You will be taken back to the "Edit Unit Type Photo" page and will see the new image presented in the "Photo(s)" section.

Editing a Unit's Rates

Each unit entered into BookPEI will have a rate entry for every day of an operator's operating season. Therefore, it is possible to set a different rate for every day that a unit is in operation. To modify a unit's rates, complete the following steps:

1. Click on the "Unit Types" tab located at the top of the BookPEI interface. You will be taken to the "Manage Unit Types" page.
2. Select the "Edit Unit Type Base Pricing" option. You will be taken to the "Unit Selection" page.
3. Select the unit that you would like to modify. You will be taken to the "Edit Unit Rates" page.
4. Choose a start date for the rate value you wish to set on this unit.

5. Choose an end date for the rate value you wish to set on this unit.
6. Enter the daily rate for this unit over the period you have specified.
7. Enter the additional person daily rate for the period you have specified. This rate will determine how much each guest over your base occupancy number will be charged.
8. When you are finished entering the date ranges and rate information, click "Add Rates". Your rates will be saved and the page will re-load allowing you to enter another rate range.
9. The calendar views at the bottom of the "Edit Rates" page summarize the rate information for the unit selected. The rate format is listed as: Daily Rate and (Daily Additional Person Rate). You can show the rates for a unit over an entire year or for a single month.

Editing a Unit's Minimum Booking

Each unit entered into BookPEI can have a minimum booking entry for every day of an operator's operating season. Therefore, it is possible to set a different minimum booking policy for every day that a unit is in operation. To modify a unit's minimum booking, complete the following steps:

1. Click on the "Unit Types" tab located at the top of the BookPEI interface. You will be taken to the "Manage Unit Types" page.
2. Select the "Edit Unit Type Minimum Booking" option. You will be taken to the "Unit Selection" page.
3. Select the unit that you would like to modify. You will be taken to the "Edit Unit Minimum Booking" page.
4. Choose a start date for the range of minimum booking days you wish to set on this unit.
5. Choose an end date for the range of minimum booking days you wish to set on this unit.
6. Choose a minimum booking days value over the period you have specified.
7. When you are finished entering the date ranges and minimum booking days information, click "Add Minimum Booking". Your minimum booking settings will be saved and the page will re-load allowing you to enter another minimum booking range.
8. The calendar views at the bottom of the "Edit Minimum Booking Days" page summarize the minimum booking information for the unit selected. The minimum booking information will show the minimum number of days required for this room to be booked on a particular date.

Editing a Unit's Availability

Each unit entered into BookPEI will have an availability entry for every day of an operator's operating season. Therefore, it is possible to set a different availability entry for every day that a unit is in operation. To modify a unit's availability, complete the following steps:

1. Click on the "Unit Types" tab located at the top of the BookPEI interface. You will be taken to the "Manage Unit Types" page.
2. Select the "Edit Unit Type Availability" option. You will be taken to the "Unit Selection" page.
3. Select the unit that you would like to modify. You will be taken to the "Edit Unit Online Availability" page.
4. Choose a start date for the availability value you wish to set on this unit.
5. Choose an end date for the availability value you wish to set on this unit.

6. Select one of the availability options for the date range you have specified. The first option, "Available for online accommodation searches and online booking", makes a unit available to be both searched and booked online from the Tourism PEI website. Once selected, the unit will be available immediately for online reservations. The second option, "Available for online accommodation searches only", makes the unit available only for searches. Customers can see the availability of the unit, but will not be able to book it directly through the Tourism PEI website. The third option, "Not available for online searches or online booking ", removes any vacancy information for that unit from the Tourism PEI website. The specific unit will not appear in any date related searches performed from Tourism PEI. Only you will be able to make bookings into that unit through the BookPEI backend. The fourth option "Not available for online searches or online booking AND disabled in BookPEI" means that the unit is not searchable or bookable by anyone, including someone logged into the BookPEI backend. No reservations can be added to the unit through any part of the TourismPEI or Book PEI system.
7. When you are finished entering the date ranges and availability information, click "Add Availability". Your availability will be saved and the page will re-load allowing you to enter another availability range.
8. The calendar views at the bottom of the "Edit Online Availability" page summarize the availability information for the unit selected. The availability information is colour-coded with an icon representing one of the three states listed above. A gray icon indicates that no availability information has been set and the unit cannot be booked at all, even through the BookPEI backend. You can show the availability for a selected unit over an entire year or for a single month.

Editing a Unit's Best Deals

BookPEI has the option of adding special discounts to units called Best Deals. These Best Deals will be highlighted on the TourismPEI website as specially discounted rates. Best Deals are currently only enabled for specific time periods, so it may not be possible to set Best Deals for any / all dates in your operating season.

Adding a Best Deal

To add a unit's Best Deals, complete the following steps:

1. Click on the "Units" tab located at the top of the BookPEI interface. You will be taken to the "Manage Units" page.
2. Select the "Edit Unit Best Deals" option. You will be taken to the "Unit Selection" page.
3. Select the unit that you would like to modify. You will be taken to the "Edit Unit Best Deals" page. The "Add Best Deals" tab will be active.
4. Choose a start date for the Best Deal you wish to set on this unit.
5. Choose an end date for the Best Deal you wish to set on this unit.
6. Select a discount percentage for the Best Deal, starting at 25%. This percentage will be applied to the base rate for the unit on the date specified.
7. When you are finished entering the date ranges and availability information, click "Update Best Deals Information". Your Best Deals settings will be saved and the page will re-load allowing you to enter another Best Deals range.

8. The calendar views at the bottom of the "Edit Unit Best Deals" page summarize the rate information for the unit selected. The original rate is shown with a strikethrough, and the new discounted rate is shown above it. You can show the Best Deals for a selected unit over an entire year or for a single month.

Removing a Best Deal

To remove a unit's Best Deals, complete the following steps:

1. Click on the "Units" tab located at the top of the BookPEI interface. You will be taken to the "Manage Units" page.
2. Select the "Edit Unit Best Deals" option. You will be taken to the "Unit Selection" page.
3. Select the unit that you would like to modify. You will be taken to the "Edit Unit Best Deals" page. The "Add Best Deals" tab will be active. Select the "Remove Best Deals" tab to activate the controls for removing a Best Deal.
4. Choose a start date for the Best Deal you wish to remove from this unit.
5. Choose an end date for the Best Deal you wish to remove from this unit.
6. When you are finished entering the date ranges and availability information, click "Update Best Deals Information". Your Best Deals settings will be saved and the page will re-load allowing you to remove another Best Deals range.
7. The calendar views at the bottom of the "Edit Unit Best Deals" page summarize the rate information for the unit selected. The original rate is shown with a strikethrough, and the new discounted rate is shown above it. You can show the Best Deals for a selected unit over an entire year or for a single month.

Deleting a Unit

If you no longer wish to have a unit in the BookPEI, it may be deleted. This operation **CANNOT** be undone and will also remove all reservation information related to that unit. To delete a unit, complete the following steps:

1. Click on the "Unit Types" tab located at the top of the BookPEI interface. You will be taken to the "Manage Unit Types" page.
2. Select the "Remove Unit Type" option. You will be taken to the "Unit Selection" page.
3. Select the unit that you would like to delete. You will be taken to the "Delete Unit Type" confirmation page.
4. Click "Yes" if you wish to proceed. *NOTE: It is currently not possible to delete a room that contains a reservation.*
5. You will receive a confirmation that the unit has been deleted. You will be taken to the "Manage Unit Types" page.

Multiple Unit Controls: Editing Unit Rates

To make some operations easier for operators, BookPEI allows certain unit properties to be modified over multiple units at the same time. For example, if you have several units that have the same rate information, it may be convenient to modify the rate information for all of those units at the same time. To perform a rate change operation on multiple units, complete the following steps:

1. Click on the "Unit Types" tab located at the top of the BookPEI interface. You will be taken to the "Manage Unit Types" page.
2. Click on the option called "Edit Unit Type Base Pricing". You will be taken to the "Unit Selection" page.
3. Select the "Edit Rates for Multiple Unit Types" option.
4. You will be presented with two columns near the top of the page. One column contains all the units currently entered into the BookPEI system. The other will be blank. Select the units that you wish to modify (you can select more than one at a time by holding down your mouse button as you drag down the list), and then click "Add Selected Unit(s) to Modify List". The units you selected will move to the empty column. These are the units that will have the rate changes applied.
5. Choose a start date for the rate value you wish to set on these units.
6. Choose an end date for the rate value you wish to set on these units.
7. Enter the daily rate for these units over the period you have specified.
8. Enter the additional person daily rate for the period you have specified. This rate will determine how much each guest over your base occupancy number will be charged.
9. When you are finished entering the date ranges and rate information, click "Add Rates Information". Your rates will be saved and the page will re-load allowing you to enter another rate range.
10. The calendar views at the bottom of the "Edit Multiple Unit Type Rates" page summarize the rate information for the unit selected. The rate format is listed as: Daily Rate and (Daily Additional Person Rate). You can show the rates for a selected unit over an entire year or for a single month.

Multiple Unit Controls: Editing Unit Availability

To make some operations easier for operators, BookPEI allows certain unit properties to be modified over multiple units at the same time. For example, if you have several units that have the same availability information, it may be convenient to modify the availability information for all of those units at the same time. To perform an availability change operation on multiple units, complete the following steps:

1. Click on the "Unit Types" tab located at the top of the BookPEI interface. You will be taken to the "Manage Unit Types" page.
2. Click on the option called "Edit Unit Type Availability". You will be taken to the "Unit Selection" page.
3. Select the "Edit Online Availability for Multiple Unit Types" option
4. You will be presented with two columns near the top of the page. One column contains all the units currently entered into the BookPEI system. The other will be blank. Select the units that you wish to modify (you can select more than one at a time by holding down your mouse button as you drag down the list), and then click "Add Selected Unit(s) to Modify List". The units you

selected will move to the empty column. These are the units that will have the availability changes applied.

5. Choose a start date for the availability value you wish to set on this unit.
6. Choose an end date for the availability value you wish to set on this unit.
7. Select one of the availability options for the date range you have specified. The first option, "Available for online accommodation searches and online booking", makes a unit available to be both searched and booked online from the Tourism PEI website. Once selected, the unit will be available immediately for online reservations. The second option, "Available for online accommodation searches only", makes the unit available only for searches. Customers can see the availability of the unit, but will not be able to book it directly through the Tourism PEI website. The third option, "Not available for online searches or online booking ", removes any vacancy information for that unit from the Tourism PEI website. The specific unit will not appear in any date related searches performed from Tourism PEI. Only you will be able to make bookings into that unit through the BookPEI backend. The fourth option "Not available for online searches or online booking AND disabled in BookPEI" means that the unit is not searchable or bookable by anyone, including someone logged into the BookPEI backend. No reservations can be added to the unit through any part of the TourismPEI or Book PEI system.
8. When you are finished entering the date ranges and availability information, click "Add Availability". Your availability will be saved and the page will re-load allowing you to enter another availability range.
9. The calendar views at the bottom of the "Edit Multiple Online Availability" page summarize the rate information for the unit selected. The availability information is colour-coded with an icon representing one of the three states listed above. A gray icon indicates that no availability information has been set and the unit cannot be booked at all, even through the BookPEI backend. You can show the availability for a selected unit over an entire year or for a single month.

Multiple Unit Controls: Editing Minimum Booking Days

To make some operations easier for operators, BookPEI allows certain unit properties to be modified over multiple units at the same time. For example, if you have several units that have the same minimum booking information, it may be convenient to modify the minimum booking information for all of those units at the same time. To perform a minimum booking change operation on multiple units, complete the following steps:

1. Click on the "Unit Types" tab located at the top of the BookPEI interface. You will be taken to the "Manage Units" page.
2. Click on the option called "Edit Unit Type Minimum Booking". You will be taken to the "Unit Selection" page.
3. Select the "Edit Min Booking for Multiple Unit Types" option.
4. You will be presented with two columns near the top of the page. One column contains all the units currently entered into the BookPEI system. The other will be blank. Select the units that you wish to modify (you can select more than one at a time by holding down your mouse button as you drag down the list), and then click "Add Selected Unit(s) to Modify List". The units you selected will move to the empty column. These are the units that will have the minimum booking changes applied.
5. Choose a start date for the minimum booking value you wish to set on this unit.

6. Choose an end date for the minimum booking value you wish to set on this unit.
7. Choose a minimum booking days value over the period you have specified.
8. When you are finished entering the date ranges and minimum booking information, click "Add Minimum Booking". Your minimum booking information will be saved and the page will re-load allowing you to enter another minimum booking range.
9. The calendar views at the bottom of the "Edit Multiple Minimum Booking Days" page summarize the minimum booking information for the unit selected. The minimum booking information will show the minimum number of days required for this room to be booked on a particular date.

Managing Reservations

In BookPEI, when a guest is associated with a unit over a set of dates, it is called a reservation. A reservation will typically contain all of the information required to outline a customer's booking of a room. Reservations can be made directly from the BookPEI backend, and can also be entered into the system by an external source (like the TourismPEI website). Before any reservations can be made, at least one unit must be entered into the system. See the *Managing Units* portion of this document for more information on preparing your units.

Adding a Reservation

To add a reservation, complete the following steps:

1. Click on the "Reservations" tab located at the top of the BookPEI interface. You will be taken to the "Manage Reservations" page.
2. Click on the "Add a New Reservation" option near the top of the page. You will be taken to the "Units and Dates" page.
3. Select the starting date for the reservation. Click "Select Start Date".
4. You will be presented with a calendar that contains all availability information for your property for one week. At the top of calendar, you must choose basic guest information. Select the number of guests and whether or not additional guests should be charged.
5. Now focus on the date portion of the calendar. On the left, all available units will be listed. Beside each unit will be seven days of availability information shown. Days that are available will be shown with rates and a radio button. Dates that are not available will display the name of the guest booked into that room. Select a unit and day combination that matches the customer's request. If you require more days that are displayed on the calendar, you can use the "Previous" and "Next" buttons at the top of the calendar to move one day back or forward. Once you have chosen all the unit and day combinations you require, click "Continue Reservation".
6. The calendar window will close and a summary of the units and dates you selected will be presented. Beside each date there will be an "Override Base Rate" option. If you wish to modify the rate given to the customer for that date, you may do so with that option. You cannot override the additional person charge, if any are present.
7. If you wish to make changes to the units and dates you have selected, choose "Modify Dates and Units" below the rates summary. The calendar will re-open and you can make changes to the elements selected.
8. When you are finished with all the unit and date selections, click "Continue Reservation". You will be taken to the "Customer Information" page.
9. Enter the customer information. A description of each field in the customer section can be found in the "Editing Customer in an Existing Reservation" portion of this document. When you are finished with the customer information, click on "Continue Reservation". You will be taken to the "Reservation Summary" page.
10. You will be presented with a summary of the reservation you have entered. If the reservation information is correct and an email address has been entered for the customer, you will be able to choose whether or not you wish to send a confirmation email to the guest. Your options for sending a confirmation email are listed at the bottom of the reservation page. You are able to choose from your own custom email template if you have one entered into the BookPEI system.

11. If the reservation information is all correct, you can click "Add Reservation" at the bottom of the page. If you wish to make changes to the reservation, you can click "Units and Dates" or "Customer Information" at the top of the page. Then repeat the steps listed above until the reservation data is correct.

Searching for a Reservation

To search for a reservation, complete the following steps:
1. Enter your search term in the box called "Reservation Search" at the top of the BookPEI page. The system can search for a reservation based upon a customer name or a reservation confirmation number. Click "Search". You will be taken to the "Search Results" page.
2. If there are any reservations in the system that match your search criteria, they will be displayed in a list. Clicking on the name of the guest will take you to the "Reservation Summary" page.

Adding or Removing Units or Dates in an Existing Reservation

To edit the units or dates of a reservation, complete the following steps:

1. First you must locate a reservation. You find a reservation by performing a search or using one of the calendar views. Click on the name of the customer in the reservation. You will be taken to the "Reservation Summary" page.
2. Towards the right-hand side of the page, click on the "Edit Reservation" option. You will be taken to the "Units and Dates" page.
3. You will see a summary of the units and dates currently selected for this reservation. To change the units or dates information, click on the "Modify Units and Dates" option beneath the reservation summary. The calendar view will open.
4. You will be presented with a calendar that contains all availability information for your property for one week. At the top of calendar, the basic guest information is stored. Make any changes to the number of adults, children, and whether additional guests are charged.
5. Now focus on the date portion of the calendar. On the left, all available units will be listed. Beside each unit will be seven days of availability information shown. The dates stored for the current reservation will be highlighted and selected. Days that are available will be shown with rates and a radio button. Dates that are not available will display the name of the guest booked into that room. You can add or remove dates from the current reservation by choosing them on the calendar. If you require more days that are displayed on the calendar, you can use the "Previous" and "Next" buttons at the top of the calendar to move one day back or forward. Once you have chosen all the unit and day combinations you require, click "Continue Reservation".
6. The calendar window will close and a summary of the new units and dates you selected will be presented. Beside each date there will be an "Override Base Rate" option. If you wish to modify the rate given to the customer for that date, you may do so with that option. You cannot override the additional person charge, if any are present.
7. When you are finished with all the unit and date selections, click "Update Dates". You will be taken to the "Reservation Summary" page where your changes will be reflected.

Moving a Customer in an Existing Reservation

To move a customer in an existing reservation, complete the following steps:

1. First you must locate a reservation. You find a reservation by performing a search or using one of the calendar views. Click on the name of the customer in the reservation. You will be taken to the "Reservation Summary" page.
2. Towards the right-hand side of the page, click on the "Edit Reservation" option. You will be taken to the "Units and Dates" page.
3. You will see a summary of the units and dates currently selected for this reservation. To move a customer, click on the "Modify Units and Dates" option beneath the reservation summary. The calendar view will open.
4. You will be presented with a calendar that contains all availability information for your property for one week. At the top of calendar, the basic guest information is stored. Make any changes to the number of adults, children, and whether additional guests are charged.
5. Now focus on the date portion of the calendar. On the left, all available units will be listed. Beside each unit will be seven days of availability information shown. The dates stored for the current reservation will be highlighted and selected. Days that are available will be shown with rates and a radio button. Dates that are not available will display the name of the guest booked into that room. You can move a guest from the current unit to any open unit by choosing them on the calendar. If you require more days that are displayed on the calendar, you can use the "Previous" and "Next" buttons at the top of the calendar to move one day back or forward. Once you have chosen all the unit and day combinations you require, click "Continue Reservation".
6. The calendar window will close and a summary of the new units and dates you selected will be presented. Beside each date there will be an "Override Base Rate" option. If you wish to modify the rate given to the customer for that date, you may do so with that option. You cannot override the additional person charge, if any are present.
7. When you are finished with all the unit and date selections, click "Update Dates". You will be taken to the "Reservation Summary" page where your changes will be reflected.

Editing Customer Information in an Existing Reservation

To edit a customer in an existing reservation, complete the following steps:

1. First you must locate a reservation. You find a reservation by performing a search or using one of the calendar views. Click on the name of the customer in the reservation. You will be taken to the "Reservation Summary" page.
2. Towards the right-hand side of the page, click on the "Edit Customer" option. You will be taken to the "Customer Information" page.
3. Modify the customer information as required. A detailed description of all the fields in the customer page is located below.
4. When you are finished changing the customer information, click on the "Update Customer" option located at the bottom of the page. You will be taken to the "Reservation Summary" page where your changes will be reflected.

Description of Customer Details

When adding or editing a customer, you will be asked to enter information about the customer. Here is a list of the fields currently available.

- **Customer Information**

  - First name – The first name of the customer.
  - Last name – The last name of the customer.
  - Address – The mailing address of the customer.
  - City – The city in which the customer resides.
  - Province / State – The province or state in which the customer resides.
  - Country – The country in which the customer resides.
  - Postal / ZIP Code – The postal or ZIP code of the customer's mailing address.
  - Telephone – The contact number of the customer.
  - Email – The contact email of the customer.
  - Estimated arrival – The estimated time of arrival for the customer at the accommodation.
  - Estimated departure – The estimated time of departure for the customer from the accommodation.
  - Deposit amount – The amount charged to the customer as a deposit for the reservation.
  - Additional Details – Any additional details about this guest that will affect the reservation (special requests, etc). This information will only be visible inside the BookPEI backend and not viewable by customers or included on any invoice.

- **Occupancy Reporting Information**

  - Location – The home location of the customer.
  - Motorcoach – Whether or not the customer was travelling in a motorcoach.

- **Credit Card Information**

  - Credit card type – The type of credit card used by the customer for the reservation. If no credit card information is taken or none is required, select the "Override" option.
  - Credit card number – The credit card number used by the customer for the reservation.
  - Credit card CSV – The Card Security Value number located on the credit card used for the reservation.
  - Credit card expiry – The credit card expiry date of the credit card used for the reservation.
  - Name on card – The name located on the credit card used for the reservation.

Adding Additional Billing Items for an Existing Reservation

The BookPEI system allows additional billing items to be added to a reservation. For example, if the customer rented a movie or made a long distance call from your property, you could bill them for that expense. To add an additional billing item, complete the following steps:

1. First you must locate a reservation. You find a reservation by performing a search or using one of the calendar views. Click on the name of the customer in the reservation. You will be taken to the "Reservation Summary" page.
2. Towards the right-hand side of the page, click on the "Add Billing Items" option.
3. You will be presented with a dialogue box in which you can enter the billing item description, price, and taxes to be charged.
4. When you have finished entering the billing item description, choose "Add Billing Item".
5. You will be returned to the "Reservation Summary" page and the billing item will appear below the units and dates information.

Showing the Account Statement for an Existing Reservation

The account statement feature allows for a printable summary of a reservation to be generated. To generate an account statement, complete the following steps:

1. First you must locate a reservation. You find a reservation by performing a search or using one of the calendar views. Click on the name of the customer in the reservation. You will be taken to the "Reservation Summary" page.
2. Towards the right-hand side of the page, click on the "Show Account Statement" option.
3. A printable version (PDF) of the reservation summary will open in a new browser window.

Sending an Email Confirmation for an Existing Reservation

You are able to send (or re-send) an email confirmation for a guest after a reservation has been made. To send an email confirmation for an existing reservation, complete the following steps:

1. First you must locate a reservation. You find a reservation by performing a search or using one of the calendar views. Click on the name of the customer in the reservation. You will be taken to the "Reservation Summary" page.
2. Towards the right-hand side of the page, click on the "Send Email Summary" option.
3. You will be presented with a dialogue box in which you can enter the email address that should receive the confirmation email. If an email address has been entered for the customer, the customer's email address will appear by default.
4. Select the email template you would like to use for the confirmation email.
5. Click "Send Email" and the customer will be sent an email with up-to-date reservation information.

Cancelling an Existing Reservation

You can cancel a reservation if it is no longer needed. This operation cannot be undone and will also remove all customer information related to that reservation. To cancel a reservation, complete the following steps:

1. First you must locate a reservation. You find a reservation by performing a search or using one of the calendar views. Click on the name of the customer in the reservation. You will be taken to the "Reservation Summary" page.
2. Towards the right-hand side of the page, click on the "Cancel Reservation" option. You will be asked to choose a reason for the cancellation of the reservation. After choosing a reason for cancellation, click "Yes" if you wish to proceed with deleting the reservation.
3. You will be redirected to the "Reservations" page and the reservation will be removed from the system.

Occupancy Reporting

BookPEI allows for the filing of provincially legislated occupancy reporting. The report can be submitted online or offline. If the reservation information entered into BookPEI is accurate and complete, the system is capable of calculating your entire occupancy report automatically.

Filing an Occupancy Report Online

When entering a reservation into BookPEI, two of the fields in the customer information record are directly related to occupancy reporting. The "Location" field and "Motorcoach" field are the two pieces of information required by the province for every customer hosted by an accommodation operator. The BookPEI system records these fields and will use them when filing an occupancy report online. BookPEI will scan all of your reservations and attempt to calculate customer origin totals based upon the "Location" field.

The default value for the customer "Location" field is "Other". TourismPEI does not allow the reporting of "Other" as an acceptable option if the customer's home location matches one of the locations included in the occupancy reporting origin list. If the "Location" field is updated accurately when the reservation is made, then the origin totals generated by BookPEI will be ready to submit to TourismPEI without correction. If many "Other" selections are left in the system, they will have to be updated before the occupancy report can be filed.

To file an occupancy report online, complete the following steps:

1. Click on the "Occupancy Reports" tab located at the top of the BookPEI interface. You will be taken to the "Occupancy Reports" page.
2. On the left-hand side of the page, select the month and year for which you will be filing your occupancy report.
3. Click on the "Preview Occupancy Report" option below your date selection. If you have not filed a report for that month and year, you will be taken to the "Occupancy Reporting" page. If you have already filed a report for that month and year, you will be taken to a read-only copy of the report you submitted.
4. You will be presented with an online occupancy reporting form. If you use BookPEI to store all of your reservations, then you will see totals automatically entered into each section of the form. If you do not use BookPEI to store your reservations, you will see zeros in every field. You must ensure that all of the fields have totals that are accurate to your reservation information. If you have reservations in BookPEI that contain the default "Other" value for the "Location" field, you may have to locate those reservations and correct the "Location" value.
5. When you are completed with entering values in the occupancy report fields, click "Submit Report" at the bottom of the page. You will receive confirmation that your report has been filed.

Filing an Occupancy Report Offline

BookPEI stores printable files that allow you to file an occupancy report offline, should you wish to do so. To begin filing an occupancy report offline, complete the following steps:

1. Click on the "Occupancy Reports" tab located at the top of the BookPEI interface. You will be taken to the "Occupancy Reports" page.
2. On the right-hand side of the page, select the "Download Printable Form" option.
3. You will be presented with a printable version (PDF) of the occupancy reporting form. Follow the directions on the form to complete your filing.

Managing the Property Profile

Every account in BookPEI is attached to either an individual user or an individual property. The property profile section allows you to manage account and property-wide settings and features. The General Property Information section stores information about the property associated with a BookPEI account (for example: property name, description, cancellation policy, etc). The General Account Information section stores information about the currently logged in user account (for example: username, password). You can also manage email templates for your account from the property profile section.

Managing General Property Information

To manage your General Property Information, complete the following steps:

1. Click on the "Property Profile" tab located at the top of the BookPEI interface. You will be taken to the "Property Profile" page.
2. Click on the "Edit General Property Information" option located on the right of the page. You will be taken to the "Edit General Property Information" page.
3. Fill out the fields presented on the "Edit General Property Information" as desired. A detailed description of each field is listed below.
4. When you are finished, click on "Update General Property Information" to save your changes.

Description of General Property Information

When updating your property profile, you will be asked to make changes to your general property information. Here is a list of the fields currently available.

- **General Property Information**

    o   GST Number – The GST number of your business.
    o   Photo – This field allows you to add up to three photos to your property description. These photos will be seen by the public.

- **General Booking Information**

    o   Minimum Booking - The minimum number of days that a unit must be occupied by a single reservation. Customers will only be able to make a booking to this unit that is equal to or greater than the minimum number of booking days. For example, if the minimum booking days are set to five, than the customer would be unable to book it for four days. This option applies to all units, but can be overridden on the individual unit level.
    o   Charge Additional for Children – Whether or not an additional charge is added to a reservation when a number is placed beside the "Children" option. Children will be charged the "Additional Person Daily Rate" or the "Additional Person Weekly Rate" as set at the unit level. See the *Editing a Unit's Rates* section of this document for additional information on that setting. This option applies to all units.

- o Cancellation Policy - This text is the cancellation policy for the entire property. HTML code is not allowed. This option applies to all units, but can be overridden on the individual unit level.

- **Advanced Features**

  - o Text Messaging Enabled – Whether or not this property receives message via text message when a reservation is received from an online source (for example, the TourismPEI website)
  - o Text Messaging Number – The mobile number to which the text message will be sent. Must be in the format XXXYYYZZZZ.
  - o Text Messaging Carrier – The name of the text messaging number carrier service.

Editing General Property Photos

You may add up to three images to your property profile. The first image in the list will be your primary image, and the remaining two images will appear when customers view your property details. To edit a property profile photo, complete the following steps:

1. Click on the "Property Profile" tab located at the top of the BookPEI interface. You will be taken to the "Property Profile" page.
2. Click on the "Edit General Property Information" option located on the right of the page. You will be taken to the "Edit General Property Information" page.
3. At the bottom of the "General Property Information" section you will see a "Photo(s)" section. There are three slots available for images, with the first being your primary image. If you have an image already added for your property you, you will see "View Current Photo". Click this option if you wish to view the image currently associated with the property. If no image has been found for the property, no image will be present. In both cases beside the image space, there will be an option labeled "Add Image".
4. Click the "Add Image" button to add a new image to your property. The image you are adding will overwrite any existing images associated with the property for that slot.
5. Choose "Browse to File" and browse to the image you would like to use on your local computer. The image must be JPEG, GIF, or PNG and less than 100MB in size. Click okay when you have located the image you would like to use.
6. A resized version of the image will appear in the preview area of the image uploader. The public will see exactly what is shown in the preview area. If you are satisfied with the image, click the "Upload File" option located above the preview.
7. You will be taken back to the "Edit General Property Information" page and will see the new image presented in the "Photo(s)" section.

Managing Custom Email Template

You can add a custom email template to your BookPEI account which will allow you to send custom reservation emails to your customers. You can have only one custom email template attached to your BookPEI account at any time. If you have no email template saved to the system, it will send out a

default email message to a customer when a booking is made. To manage your Email Template, complete the following steps:

1. Click on the "Property Profile" tab located at the top of the BookPEI interface. You will be taken to the "Property Profile" page.
2. Click on the "Edit Email Template" option located on the right of the page. You will be taken to the "Add/Edit Email Template" page.
3. On the "Add/Edit Email Template" you will be presented with the fields required to create or edit your own email template.
4. Modify the email template as required. A detailed description of all the fields in the email template is located below.
5. You can preview your email template by choosing "Preview Email Template" from the right side of the page. A popup will appear that will show you a sample of what your email will look like when sent to a customer. You can also send a sample of your reservation email to an email address of your choosing by clicking on the "Send Email Sample" option along the right side of the page. If you wish to view the default email template, click on the "View Default Template" to see the generic version of the email send to customers.
6. When you are finished changing the template information, click on the "Add / Update Email Template" option located at the bottom of the page. You will see a confirmation message and your email template changes will be saved.

Description of Email Template Information

When updating your email template, you will be asked to make changes to the various email template elements. Here is a list of the fields currently available.

- Greeting Text – This text field is a greeting that will appear at the top of your reservation email. It will appear exactly as you type it in this box, with no text styling. HTML is not allowed.
- Reservation Summary – You can choose between two different kinds of reservation summaries to send to your guests. The first is a "Full Reservation Summary" and is a longer reservation description that contains the text included in the sample. The second is a "Short Reservation Summary" that contains a more compact reservation summary.
- Closing Text – This text field is a closing paragraph that will appear underneath the reservation summary in your email. It will appear exactly as you type it in this box, with no text styling. HTML is not allowed.

Setting Up Integrated Vacancy Search

It is possible to share the information stored in your BookPEI with several different web-based sources. By default, your accommodation information is displayed on the TourismPEI website where customers are able to view your inventory and property profile. You can also share your accommodation information to your own website using the Integrated Vacancy Search. The Integrated Vacancy Search is a tiny portion of HTML-based code that you can plug into your website and allow customers to search and book accommodations in your property directly from your own website. To active your Integrated Vacancy Search account, complete the following steps:

1. Click on the "Property Profile" tab located at the top of the BookPEI interface. You will be taken to the "Property Profile" page.

2.   Click on the "Setup Integrated Vacancy Search" option located on the right of the page. You will
     be taken to the "Setup Integrated Vacancy Search" page
3.   If you do not have an Integrated Vacancy Search account already enabled, click on the "Enable
     Integrated Vacancy Search" option.
4.   Your Integrated Vacancy Search account will be created and instructions for its usage will be
     displayed on-screen in BookPEI.

Managing General Account Information

To manage your General Account Information, complete the following steps:

5.   Click on the "Property Profile" tab located at the top of the BookPEI interface. You will be taken to
     the "Property Profile" page.
6.   Click on the "Edit General Account Information" option located on the right of the page. You will
     be taken to the "Edit General Account Information" page.
7.   Currently, only a password can be changed on the General Account Information page. To
     change your password, click on the "Change Password" option. You will be asked to enter your
     old password, and then enter your new password. When you are finished, click "Update
     Password" and your changes will be saved.

Help and Support

BookPEI has a help and support section that contains both the user manual and a searchable knowledge base. The manual provides a comprehensive list of operations that can be performed within the BookPEI framework. The knowledge base stores answers to the most common questions asked about the BookPEI system. In addition to the self-serve support options of the manual and knowledge base, the help and support section provides a place for users to enter bug reports or feature requests.

Searching the Knowledge Base

By default, the "Help and Support" page will list the top ten BookPEI questions. To search the knowledge base, complete the following steps:

1. Click on the "Help" tab located at the top of the BookPEI interface. You will be taken to the "Help and Support" page.
2. On the top of the page, type in your question of keywords. Click the "Search" option beside the input box. You will be taken to the "Search Results" page.
3. You will see a list of questions in the "Search Results" page. Click on the question that best matches what you were searching for. If required, try a different search to refine your results.

Submitting a Bug Report or Feature Request

To submit a bug report or feature request, complete the following steps:

1. Click on the "Help" tab located at the top of the BookPEI interface. You will be taken to the "Help and Support" page.
2. In the lower right-hand corner of the page, click on the option "Make a Bug Report of Feature Request". You will be taken to the "Bug Report and Feature Request" page.
3. Choose the type of request you are making, a Bug Report or Feature Request.
4. Choose the section of BookPEI or general topic to which your report relates.
5. Type in the details of your report.
6. When you are finished, click "Submit Request / Report". You will be provided with a confirmation that your report has been entered into the system. Where appropriate or required, a technical or design representative will follow-up on your request.

Contacting Technical Support

If require additional assistance at any time with the BookPEI system, you can contact technical support directly by email or telephone.

- Telephone: 1-866-213-7521 (toll free)
- Email: bookpei@gov.pe.ca