

# Manual

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**PMS – Report Set User Guide**

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## 1. Overview

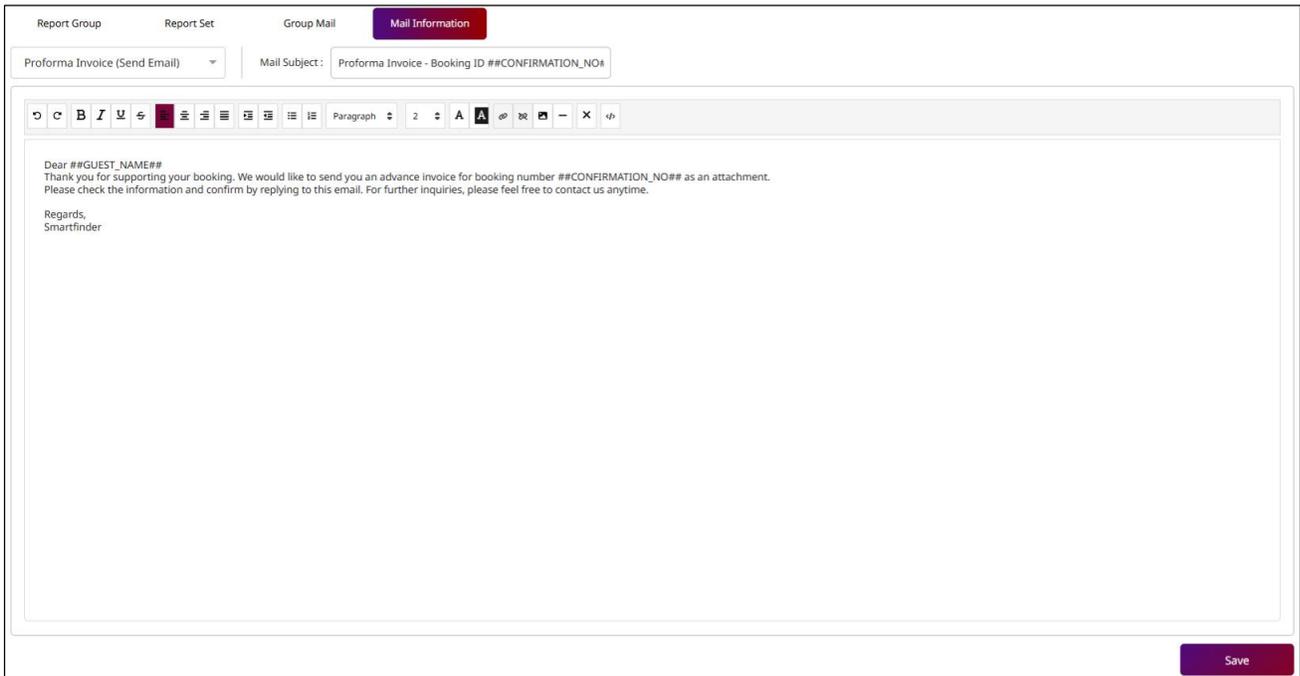
The Report Set module in PMS allows staff to configure email reporting after daily closing. This includes setting up email content, managing mail groups, assigning reports to specific groups, and re-sending reports as needed. It helps automate the report distribution process for operational efficiency.

## 2. Config Mail Information

Available under **PMS Manager > Mail Group & Report > Mail Information**, this function allows users to set up report mailing information, including report type, subject, and message content for sending reports after closing.

To perform the task:

1. Select **PMS Manager** function
2. Select **Mail Group & Report** menu
3. Select **Mail Information** tab
4. Select type of report
5. Enter mail subject details
6. Enter message for the report
7. Click **Save** to confirm



The screenshot shows the 'Mail Information' configuration screen. At the top, there are tabs for 'Report Group', 'Report Set', 'Group Mail', and 'Mail Information'. Below the tabs, there is a dropdown menu for 'Report Group' set to 'Proforma Invoice (Send Email)' and a 'Mail Subject' field containing 'Proforma Invoice - Booking ID ##CONFIRMATION\_NO#'. A rich text editor is visible below, with a toolbar showing various formatting options. The message content in the editor is: 'Dear ##GUEST\_NAME## Thank you for supporting your booking. We would like to send you an advance invoice for booking number ##CONFIRMATION\_NO## as an attachment. Please check the information and confirm by replying to this email. For further inquiries, please feel free to contact us anytime. Regards, Smartfinder'. A 'Save' button is located at the bottom right of the form.

**Note:** Ensure the mail subject and message are clear and relevant, as these will appear in the recipient's inbox and affect email readability.

### 3. Config Group Mail

Available under **PMS Manager > Mail Group & Report > Group Mail**, this function allows users to configure mail groups used to receive scheduled reports. Users can define group code, name, type, assign staff and add reports to group.

To perform the task:

1. Select **PMS Manager** function
2. Select **Mail Group & Report** menu
3. Select **Group Mail** tab
4. Click **New** to add mail group
5. Enter **Group Code and Group Name**
6. Select **Group Type**
7. Click New to select staff or manually add name and email
8. Click New to select report
9. Click **Save** to confirm

Mail Group
✕

Group Code \*

Group Name \*

Group Type

Status

+ Language

Sending Email

+

|   | Staff Code | Staff Name   | E-mail Address                | Position                |   |
|---|------------|--------------|-------------------------------|-------------------------|---|
| + | 2773       | KANNIKA ANT. | kannika.smartfinder@gmail.com | Front Office Manager    | ✕ |
|   | 3805       | Alice Staff  | staffsoraso.hk@gmail.com      | Housekeeping Supervisor | ✕ |

**Note:** Double-check email addresses and assigned staff to avoid missed reports or failed deliveries.

## 4. Config Report Set

Available under **PMS Manager > Mail Group & Report > Report Set**, this function allows users to define groups of reports to be sent to email groups after close day, including selection of file types, parameters, and recipients.

To perform the task:

1. Select **PMS Manager** function
2. Select **Mail Group & Report** menu
3. Select **Report Set** tab
4. Click **New** to add report set
5. Enter Report Set Code and Name
6. Select file type to send after close day
7. Click **New** to select group mail and confirm selection
8. Click **New** to select reports to include in the set
9. Select business name as PMS
10. Select report and click Select
11. Optionally enter a new report name
12. Click Parameter Set to configure report parameters
13. Set the parameters as needed
14. Click Save to confirm

**Report Set**
✕

Report Set Code \*

Report Set Name \*

Auto Send Mail (Day End)

File Type Send Mail

PDF x
Excel x
✕ ▾

+ Language

Sending Information ( Mail Group )

+

| Group Code | Group Name |
|------------|------------|
| Set01      | Report Set |

+

| No. | Code    | Name               | Alias Name           | Parameter   |
|-----|---------|--------------------|----------------------|---|
| 1   | R200101 | Reservation Booked | <input type="text"/> | <div style="display: flex; align-items: center; gap: 5px;"> <span style="background-color: #8e44ad; color: white; padding: 2px 5px; border-radius: 3px;">Parameter Set</span> <span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px;"> </span> </div> |

Save
Cancel

**Note:** Make sure the selected file type and parameters match the needs of the recipient group. Incorrect parameters may lead to incomplete or inaccurate reports.