

# Manual

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## PMS-Trace & Track User Guide

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## 1. Overview

This PMS – Trace & Track Guide helps hotel staff manage tasks and actions related to reservations. It covers creating and assigning traces, tracking task completion, and ensuring timely follow-up across departments. The guide is structured for clarity with step-by-step instructions and real-world scenarios.

## 2. Make a Trace

Available under **Trace & Track Menu > Make Trace**, this function allows staff to create and assign traces for tasks, ensuring timely follow-up across departments.

To perform the task:

1. Press **Make Trace**.
2. Fill in the necessary information (Trace Template, Assign To, Due Date, Alert, Follow Up, etc.).
3. Enter **Notice**.
4. Press **Save** to create the trace.  
 Press **Cancel** to cancel the action and close the pop-up.  
 Press **Save & Post to Guest** to send the trace to the guest.

**Make Trace**
✕

<b>Doc No.</b> <input type="text" value="TC#####"/>	<b>Room No.</b> <input type="text"/>	<b>Guest Name</b> <input type="text"/>	<b>Trace Template *</b> <input type="text"/>
<b>Trace Type</b> <input type="text"/>	<b>Assign To *</b> <input type="text"/>	<b>Collaborator</b> <input type="text"/>	<b>CC To</b> <input type="text"/>
<b>Due Date *</b> 13/01/2025 <input type="text"/>	<b>Alert *</b> None <input type="text"/>	<b>Trace Alert Hour</b> Please Select <input type="text"/>	<b>Follow Up *</b> None <input type="text"/>
<b>Follow Up Hour</b> Please Select <input type="text"/>			

Trace Template Name : Trace Feature Name Due Date 13/01/2025


Message

**SAIPARN SP.**  
13/01/2025 : 14:19

 New Trace

**Notice \***

**Note:** Ensure that all required information is entered accurately and completely to avoid any confusion or delays in task follow-up. Additionally, choose the appropriate alert option to stay informed on the task’s status, ensuring timely actions and updates.

- None — No alert will be triggered.
- Immediately — Triggers the alert as soon as the event occurs.
- Every Hour — Triggers alerts every hour.
- Every Day Specific Time — Triggers an alert at a specific time every day.
- Every (Time) — Triggers an alert in a custom interval (e.g., every 3 hours).
- Monday (Day) + Time — Triggers an alert on a specific weekday and time.
- Day Before + Action — Triggers an alert one day before the event.
- Hour Before + Action — Triggers an alert a set number of hours before the event.
- Specific Date + Time — Triggers an alert at an exact date and time.

Select Alert ✕

Q Search C

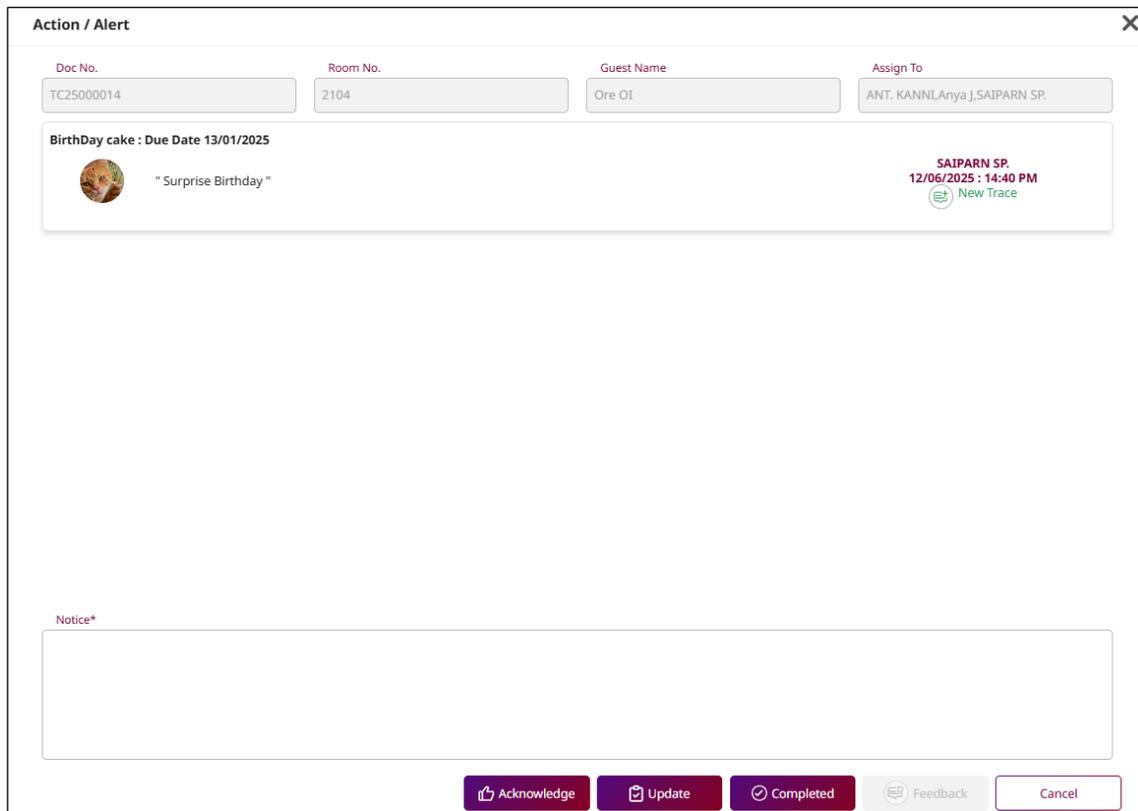
	Alert Code	Condition Name	Alert Name
	1001	None	None
	1003	None	Immediately
	1004	None	Every Hour
	1005	None	Every Day Specific Time
	1006	None	Every (Time)
	1007	None	Monday (Day) + Time
	1008	None	Day Before + Action
	1009	None	Hour Before + Action
	1010	None	Specific Date + Time

### 3. Update a Trace

Available under **Trace & Track Menu > Trace**, this function allows staff to update the trace with real-time progress, ensuring accurate tracking of task status and communication across departments.

To perform the task:

1. Select a Trace.
2. Press **Update Action**.
3. Press **Acknowledge** to confirm acknowledgment of the task or notification.  
 Press **Update** to update on the status or progress of the trace.  
 Press **Completed** to mark the trace as finished.  
 Press **Feedback** to provide additional comments or details about the trace. (The Feedback option will display when Complete is pressed, allowing staff to add any relevant comments or details regarding the trace.)  
 Press **Cancel** to cancel the action and close the pop-up.



**Action / Alert** [X]

Doc No.  Room No.  Guest Name  Assign To

BirthDay cake : Due Date 13/01/2025  
 " Surprise Birthday "

SAIPARN SP.  
 12/06/2025 : 14:40 PM  
 New Trace

Notice\*

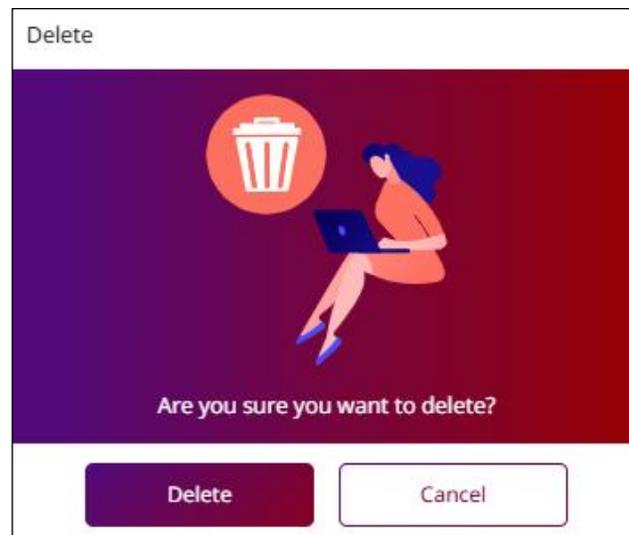
**Note:** Ensure that all updates, acknowledgments, and feedback are entered promptly to maintain accurate and timely tracking of the trace.

#### 4. Delete a Trace

Available under **Trace & Track Menu > Trace**, this function allows staff to delete a trace when it is no longer required, ensuring that only relevant tasks are kept in the system.

To perform the task:

1. Select a Trace.
2. Press **Delete**.  
Press **Delete** again to confirm the deletion of the trace.  
Press **Cancel** to cancel the action and close the pop-up.
3. The system will display a success pop-up and delete the trace.



**Note:** Deleting a trace is a permanent action. Ensure that the trace is no longer needed before confirming the deletion, as it cannot be recovered once deleted.