



The Client's Status Management Manual



What Is A Status?

A status is what we label our clients as, if you have conference. For example: The conference is Culinary expo. You are aware there is going to be another expo in 5 months. You can already in 2 months time market your hotel to the clients for accommodation and create a package that includes the transport / shuffle services as well.

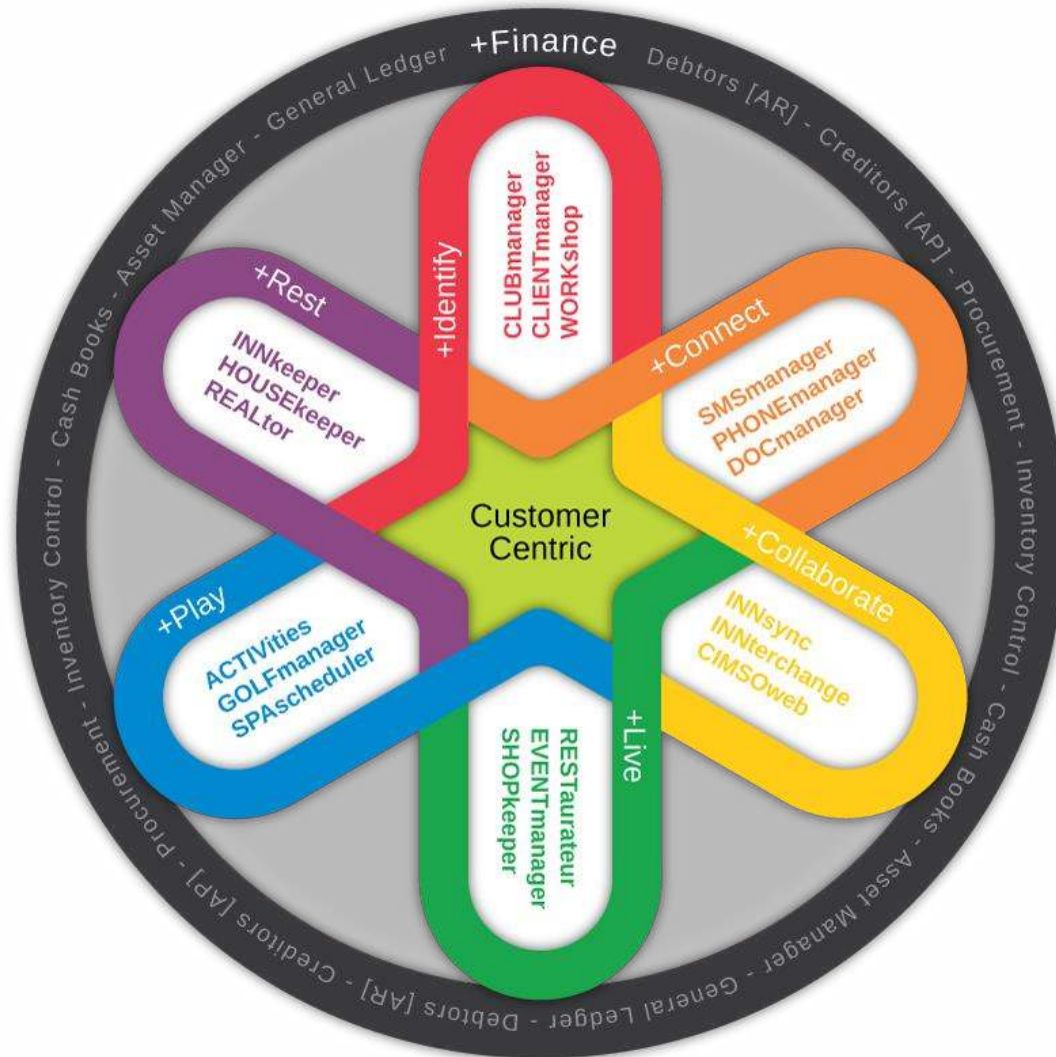
Why Have A Status?

The statuses help for a marketing tool and for client experience improvement

When Do You Use A Status?

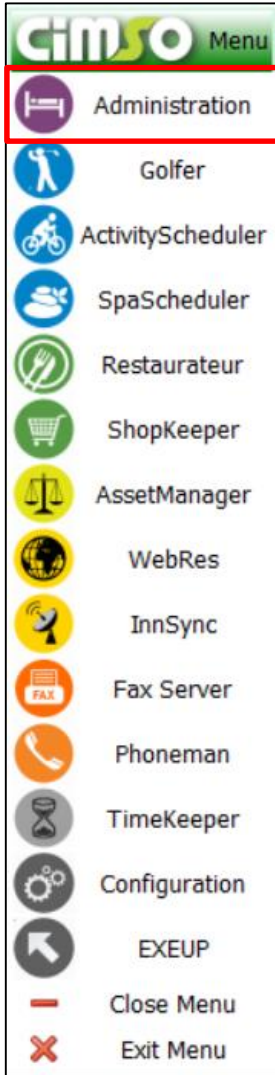
You can use any time, the idea is to use it for marketing purposes and for client experience improvement.

Think of the rugby, people travel across country and overseas to watch the games live. If you know your client is a rugby fan and is only staying at your hotel for accommodation and distance to the stadium. You would want to exploit that knowledge of marketing to them accommodation on upcoming games.



CUSTOMER CENTRIC DESIGN

- **Identify** – CDP – customer data platform with extensive CRM
- **Connect** - Single or bulk blast e-mail, SMS, fax and snail-mail
- **Collaborate** - Local server to Web and mobile device data interchange
- **Live** - Food, Beverage and Retail points of sale with stock control and procurement
- **Play** - Schedule and manage Golf, SPA and Leisure activities
- **Rest** - Reservations, Lodging PMS, Leasing and Timeshare
- **Finance** - GAAP, IAS and IFRS financial control to balance sheet



The screenshot shows the INNkeeper login interface. At the top, there is a header with the INNkeeper logo and the CiMSO logo, along with the text 'Customer Centric Integrated Management Software'. Below the header, the version number 'V4.1.8b14276' is displayed on the left and 'e4db41a' on the right. The main area contains a login form with the following fields:

- Language: English (United Kingdom) (dropdown menu)
- Database: CiMSODemo_V418 on vmserver (dropdown menu)
- Location: MAIN Imperial Palace Rooms (dropdown menu)
- Login ID: master (dropdown menu)
- Password: (text input field)

At the bottom of the form, there are three buttons: 'Identification' (with a globe icon), 'Password' (with a key icon), and 'Log In' (with a green checkmark icon).

Start your **CiMSO Menu**, select the **Administration**. Use your given **Login ID** and **Password** to log in



The screenshot shows the INNkeeper software interface. The title bar reads "INNkeeper - Licensed to Imperial Palace - LoginID: MASTER". The main menu includes "Shortcuts", "Clients", "Reservations", "Property", "Products/Servi...", "Task Manager", "Workflow", and "Tickets". Below the menu is a toolbar with icons for "Links", "Visuals", "Tasks", "View Client Transactions", "Transactions", "Reports", and "Manage Cards". A search bar is visible with the text "Ms M Weste" and a search button. Below the search bar, there are two dropdown menus: "Search in [All Client Keywords]" and "for words starting with (fast search)". A table header is visible with columns: "Memberships", "Client Code", "Main Member", "Company", "Surname", "First Name", "Initials", "Title", and "Contact Detail". The table body is empty, and a warning message is displayed in the center: "There are more than 1000 records matching the current criteria. Please refine your search. Click here to show all matches."

Once logged into Administration, You are able to navigate through the Database



INNkeeper - Licensed to Imperial Palace - LoginID: MASTER

Shortcuts **1** Clients Reservations Property Products/Services Task Manager Tickets

Search **2**

Search in [All Client Keywords] for words starting with (fast search) **3** weste

Memberships	Client Code	Main Member	Surname	First Name	Initials	Company	Title	Contact Detail
	NWFA0001	[MAIN]						
	STRY0002	[MAIN]	Strydom	Dirk	D		Mr	
	ROSE0006	[MAIN]	Rosenstein	Charles	C	Raubex	Mr	
	RRWE0002	[MAIN]	Weste	Samuel	S	Rayne Of Talent	Dr	drsweste@gmail.co
9/A	WEST0003	[MAIN]	weste	Mikado	M	Rayne Of Talent	Ms	0762781176
	WTRA0005	[MAIN]	Weste	Rayne	R	Weste Travels	Ms	keishiar@cimso.com

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Navigation: The Client Profile – Status Linking

- 1** Clients tab
- 2** Search tab
- 3** **Fast-Search:** type in the surname of the required profile
- 4** **Locate & Select:** select to highlight the required profile
- 5** Select the **Accept** (double blue & green tick glyph)



1 Clients tab

2 The Selected Client Profile tab

3 Select the Statuses subtab; this is to check that if we have or do not have any statuses linked to the profile

4 Select the Links button

Type	Description	Statuses	Number/Address	Priority	Access Restriction
E-mail	Private email		drsweste@gmail.com	5 Average	Access Hiding
Cell	Direct Cell		0821234567	5 Average	Access Hiding

Status	Status detail	Associated date

The Client Profile: Status Linking

- 1 Clients tab
- 2 The Selected Client Profile tab
- 3 Select the Statuses subtab; this is to check that if we have or do not have any statuses linked to the profile
- 4 Select the Links button



Client links for Dr S Weste (RRRRWE0002) **1**

Make Client Available Online

Client Status Links **2** Mass Statuses Staff Member Links Linked Memberships

Status	Status Detail	Associated Date
<input type="checkbox"/> DEB Debtor		
<input type="checkbox"/> DEBK Booking Debtor		
<input type="checkbox"/> DEBKDPR Booking Debtor (Departed)		
<input type="checkbox"/> DEBKIN Booking Debtor (In House)		
<input type="checkbox"/> DEBTRADE Trade Debtor		
<input type="checkbox"/> APPDEB Approved Debtors		
<input type="checkbox"/> CRED Creditor		
<input checked="" type="checkbox"/> MEMBER Membership Status		
<input type="checkbox"/> MEMACT Active Member		
<input type="checkbox"/> MEMINACT Inactive Member		
<input type="checkbox"/> MEMPR Prospective Member		
<input checked="" type="checkbox"/> TRAIN Training		
<input type="checkbox"/> MEMSTAT Member Status		
<input type="checkbox"/> MEMAPPLY Member Application		
<input type="checkbox"/> NOCREDIT No Credit		
<input type="checkbox"/> CREDITOR Creditor		
<input checked="" type="checkbox"/> DEBTOR Debtor		
<input type="checkbox"/> AGENT Bookings Agent		
<input type="checkbox"/> BLACKST Black Listed		
<input type="checkbox"/> NOTINUSE Not In Use		
<input checked="" type="checkbox"/> TOUROP Tour Operator		
<input checked="" type="checkbox"/> TOUROP10 Tour Operators 10% Discount		
<input type="checkbox"/> FUINC Fully Inclusive Rate		
<input checked="" type="checkbox"/> GOLFER Golfer Status 3		
<input type="checkbox"/> TSCCAT1 Tournament Category 1		
<input type="checkbox"/> TSCCAT2 Tournament Category 2		
<input type="checkbox"/> TSCSERV Tournament Service		
<input type="checkbox"/> INTERNET Internet Profile		
<input type="checkbox"/> EXPEDIA Expedia created client		
<input type="checkbox"/> JWVG JW Special Geust		
<input type="checkbox"/> OWNER Timeshare owner		

Client Statuses **4**

- DEBTOR Debtor
- DRCTRL Debtors
- GOLFER Golfer Status
- TOUROP10 Tour Operators 10% Discount
- TRAIN Training

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The Client Profile: Status Linking

- 1 Clients Links For** window
- 2 Client Status Links** tab
- 3 Locate & Select:** select and check the boxes. This will add the statuses to the Client Statuses grid located on the right
- 4 Client Statuses grid:** you will see the statuses you add to the profile in this grid
- 5 Select the Close (x glyph)** to close the window



INNkeeper - Licensed to Imperial Palace - LoginID: MASTER

Shortcuts **1** Clients Reservations Property Products/Services Task Manager Tickets

Search **2** Dr S Weste

Surname: Weste Title: Dr Employer: Rayne Of Talent Client Code: RRWE0002
First Name: Samuël S Gender: Male Designation: Traveling Doctor Member No:
Given Name: Sam Birth Date: 5 Apr 1955 Greeting: Dear Dr S Weste ID/Passport:
Nationality: Romania Language: English Mailing: Dr S Weste Reference:

3 Detail Client Financial Custom Fields Client Notes Client Messages Client Preferences Identification Documents Memberships Dependants

Type	Description	Statuses	Number/Address	Priority	Access Restriction
E-mail	Private email		drsweste@gmail.com	5 Average	Access Hiding
Cell	Direct Cell		0821234567	5 Average	Access Hiding

Addresses Contacts Remarks **4** Statuses Bookings Waiting List Contracts Tickets For Client Property

Status	Status detail	Associated date
DEBTOR Debtor		
DRCTRL Debtors		
GOLFER Golfer Status		
TOUROP10 Tour Operators 10% Discount		
TRAIN Training		

Access Restriction: Access Hiding

The Client Profile: Status Linking

- 1** Clients tab
- 2** The **Selected Client Profile** tab
- 3** **Detail** subtab
- 4** Select the **Statuses** subtab: we are now able to see the Statuses we have just added to the profile



Thank you!