

SWTE Accommodator Guide — Upgrading to SWTE Pro

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Before We Begin

By now, you would have been running SWTE for a while and the time has come for adding lots more functionality to your system by upgrading to the all-singing, all dancing, our top of the range product — SWTE Pro.

How to Use this Booklet

This booklet has four sections:

1. an introduction where we discuss what's on offer in SWTE Pro
2. how to configure SWTE Pro to use its features
3. a tour of SWTE Pro
4. detailed steps on how to use the new features

Accommodators upgrading from SWTE Landlord or SWTE Home will be familiar with community tasks and on-line stayers agreements and might like to skip over those topics.

How you use this book is up to you, but we suggest that you start by reading through section 1, the introduction, giving some thought to the features you should implement.

Once you've decided what to implement, you can work through the section 2 (configuration), making the necessary changes as you go. When you've done that, take the tour in section 3. Section 4 is quite detailed and you might find that it easier if you use it as a reference.

Remember this — only implement the additional features if you want to. Your system will continue to work fine just as it is and if you decide not to implement them now, you can do so whenever you want. If you need more help or if you need to discuss the pros and cons of the options, talk your SWTE facilitator.

Section 1 — Introducing SWTE Pro

Before we get started with SWTE Pro, let's have a look at the features and discuss what they could do for you. You don't have to implement everything in the list, but there will be some things for you to consider. If you're upgrading directly from SWTE Start, everything in the list is probably new. If you've come via SWTE Landlord or SWTE Home, you will be familiar with some of the features listed below, but you'll find that in SWTE Pro, there's even more functionality.

In SWTE Pro, you get everything in SWTE Start, plus these features:

- community task management
- on-line stayer agreements and check-ins
- support for operations with multiple houses
- more accommodator settings
- sales reporting and analysis tools
- range of accounting functions and reports
- comprehensive task management
- request processing
- rewards program
- SWTE invoice direct debit
- inventory and asset management
- branding and web site integration

Let's see what these features can do for you should you choose to implement them.

Community Tasks

The community task system means that your stayers keep your property clean for you. You get them to agree to do this as part of their contract. When you check them in, you will have to allocate them a common zone of your property to keep clean. If stayers don't present clean rooms and their allocated zone by the days and times agreed to, they are liable to a fine.

We have a community task program for those accommodators who believe that each member of a shared-living community should contribute towards the maintenance of the common living areas. All stayers are dependent on each other for the quality of their shared-living experience.

Community tasks earn stayers reward points that can be spent on discounts or free stuff within the SWTE rewards program. Points are earned by all stayers each time a house has a community task inspection. Stayers responsible for areas deemed satisfactory will be rewarded with 10 points each inspection and those deemed unsatisfactory will be penalised 10 points. Accommodators may also choose to impose a cash fine for non-compliance of community tasks.

Accommodators can choose to not have community tasks.

If you choose to implement community tasks, here are some of the things that you'll have to do:

- decide how much you want to fine them for non-compliance
- decide when you're going to do inspections
- draw up a floor plan and create zones
- enter those zones in the system
- assign stayers to those zones

On-Line Stayer Agreements

On-line stayer agreements allow you to force new stayers to acknowledge your terms and conditions on-line, before they move in. It means that:

- you don't have to have a copy of the terms and conditions for them when they arrive
- it saves time and simplifies the check-in procedure because they can do this before they turn up at the house
- every stayer that moves into your property does so only after having accepted your terms and conditions
- they understand the terms and the consequences of non-compliance

On-line stayer agreements are a good thing. You can edit the terms that they have to agree to. If you decide to implement this feature and someone turns up without having completed it, then you'll need to think about what to do. You might like to consider having a computer on the property or some other contingency, such as a printed copy of the terms for them to read and sign.

Support for Multiple Houses

If your operation expands and you want to add more houses, you can. You can even create your own little network of houses if you want.

More Accommodator Settings

You'll find that you have so much more control over your system with SWTE Pro. Among the settings you'll find:

- support for staff and control over their access to the system
- more contracts allowing you to have short and long stay rates
- customise terms of stay
- set up query templates to automate responses to stayer queries

Sales Reporting and Analysis Tools

SWTE Pro's sales tool allow you to monitor your marketing. You can see who's created accounts through your system and whether they viewed and booked. You can monitor your beds and plan for vacancies, run a waiting list and see who referred you stayers to you.

Full Range of Accounting Reports

We'll look at the accounting reports and functionality later in the booklet. For now, we'll just say that there's lots!

Task Manager

The task manager is one of SWTE Pro's most powerful tools. If you have staff, you'll find that you can manage them remotely by assigning jobs and directing stayer requests to them. The task manager helps to make your staff more accountable. You can easily set up recurring staff task lists and re-assign those jobs if staff leave or take holidays.

Request Processing

This is another of SWTE's power tools. If your stayers or staff need something done, they can make requests any time they like without having to track you down. You can manage those requests remotely, approving or rejecting them and assigning them as tasks to your staff.

Rewards Program

A reward program allows your stayers to earn reward points for performing both community and reward tasks. Reward tasks are those beyond the call of duty tasks that no one wants to do, like cleaning the ovens and fridges.

If you set up a program, you can foster links with local businesses by inviting them to join.

We'll go into the rewards program in detail later, but in the meantime, think of it as a way of getting your stayers to be a very cheap source of labour.

Inventory and Asset Management

SWTE has a hugely powerful inventory and asset manager. It allows you to control stock, record all the details of all your appliances and fittings; and to set up lists of preferred suppliers and contractors. It means that you'll know where everything belongs and what's needed to fix it so that your repairers will never turn up with the wrong parts again.

You don't need to implement all of it, but you'll find that even if you use just parts of it, your business will run much more efficiently.

Branding and Web Site Integration

If you want to have your stayers log on through your web site, we can arrange that for you. Your SWTE Pro system can look just like your system. Talk to your SWTE facilitator for more information.

Help everywhere

All the screens in the SWTE system have pop-up help bubbles. Refer to them for detailed information about what you need to enter in a particular field.

Of course, if you need more help, you can always get hold of your SWTE facilitator.

Section 2 — Configuring Your Upgraded System

If you've upgraded from SWTE Landlord or SWTE Home, you will probably be familiar with some of the things in this section. If you have already implemented on-line agreements and community cleaning, you can skip this section. If you've upgraded from SWTE Home and if you've acquired more properties, then go on to section *Adding a New House to the System*.

Once you've made up your mind about the features to implement and how you're going to use them, you'll need to go into the settings and that's where we'll go next.

A word of warning: remember that you're using a live system and any changes you make to your settings will effect your stayers.

Log in as an accommodator and we'll get started.

Editing Settings

Click **Settings** in the left hand menu.

This is where you control all the settings for your houses and business logic. Under here you find:

- **Accommodator details** – basic operating settings (e.g. contact details, business address etc)
- **Staff types** gives you control over the parts of the system that your staff can access
- **Staff members** allows you to create staff accounts and grant them access privileges according their staff type
- **Contract types** – set up contract terms, including minimum stay length, deposit amount, penalties and more
- **Agreement terms** – what stayers have to agree to when they move in
- **Customize terms of stay** – pick and choose what to have in your electronic check-ins
- **Query templates** is where you can set up your automated stayer query handler
- **Setup Houses** – everything about houses: what facilities, office opening times, inspection times, zones and more
- **All house rates** – the rates that are attached to the various contracts
- You set the system up in advance of the days that you intend to be closed under **Holidays**

When you first came on the SWTE system, your operation and your first house was set up with a basic default system. This is where you go to fine tune things to suit your requirements.

Welcome Larry Landlord

Wednesday, 1

My Workplace
My Tasks
My Messages
My Notices
Staff Requests
Task manager
Process Requests
Manage Stayers
Inventory
Reward Programs
Jobs
Settings
Sales
Accounting
Support

Money in	\$ 0.00	Cash In	\$ 0.00	Arrivals today
Money out	\$ 0.00	Cash out	\$ 0.00	Departures today
Total balance	\$ 0.00	Cash balance	\$ 0.00	Bed change today

User nick name Search

Operator details Staff types Staff members Contract types Agreement terms Customize terms of stay
Query templates Setup houses All House rates Holidays

Operator details

Operator code

Operator name

Address

Phone

Fax

Throughout the settings pages, there is help everywhere. Except for what's needed to get your upgrade happening, we won't go through all the details and ins and outs of the settings just yet. The best way for you to learn how configure your system is to get in there and look for yourself.

Next to every field is a question mark that looks like this: . Click it and you'll get a pop-up that will tell you exactly what that setting does and the likely impact it will have on your stayers and your business.


A word of warning: if you don't feel confident about changing something, then don't. You'll probably find that most of the default settings will suit your business just fine. If you do make changes, you can always come back and undo things. So before you make a change, write down what the settings were before the change so that if it doesn't work the way you want it to, you can come back and put it back to the way it was.

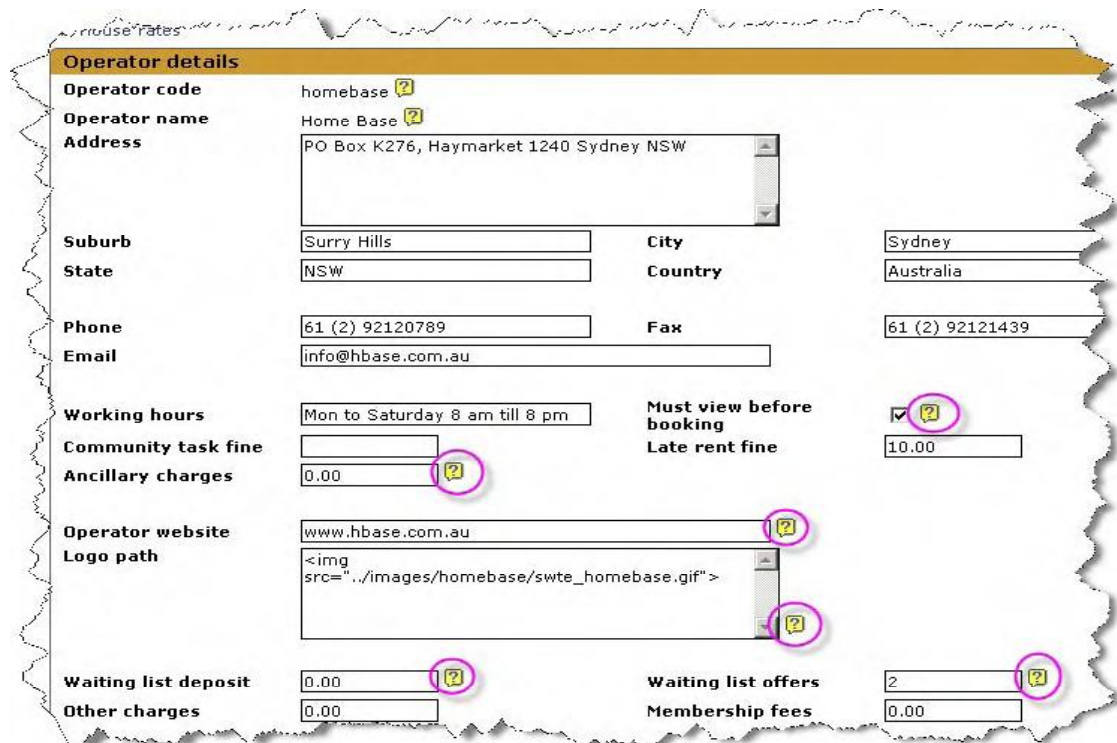
All the settings pages work in much the same way. You can edit existing settings or add new ones or both. Let's take a simple one as example – your accommodator details.

To making changes to settings

1. Click **Settings**.
2. Scroll down until you can see the **Edit** button and then click it.

Waiting list deposit	1.00
Waiting list offers	1
Other charges	0.00
Membership fees	0.00
Infinite bed state	Yes
Allow online booking if lived on SWTE	No
Operator web address	
Check in required	No
Community cleaning	Yes

3. You can see that most of the fields are editable. Click on the  next to each field for brief explanation of what to put in that field.



Before moving on, take time to look at the various settings, and don't forget to click the help buttons. Next, we'll be looking at some specific settings to get your upgrade working.

Enabling Community Tasks and Electronic Check-ins

If you've come from SWTE Landlord or SWTE Home, you can skip this section.

If you want to implement community tasks and electronic agreements, you need to enable them in the settings.

To enable community tasks and electronic check-ins:

1. Click **Settings**.
2. Click **Operator details**.



3. Scroll down the page and click **Edit**.
4. If you want to enable electronic check-ins, check the box next to Check in required, otherwise leave it unchecked.
5. If you want to enable community tasks, check the box next to Community cleaning otherwise leave it unchecked.
6. Click **Save**.

7. Scroll down to see the new settings.

What's next?

If you're implementing community tasks, go to the next procedure. If you're not, but implementing electronic check-ins, then go to *Setting up the Agreement Terms*.

Drawing the Floor Plan

If you've come from SWTE Landlord or SWTE Home, you can skip this section.

If you're going ahead with community cleaning, you'll need a floor plan so that you can show your stayers the zone that you want them to keep clean. Prospective stayers can also use the floor plan to see the layout of your property when using the search engine.

If you want, you can have your floor plan drawn professionally by our graphics people. Fax your draft to 1300 662 063. We will send you an invoice at \$5 per room. On payment, we will redraw your floor plan professionally and email it back to you for uploading into the system. Remember to keep a copy of your hand drawn plans on file. Point your browser to www.swte.biz/services for more information and samples.

If you're going to draw the plan yourself, it's important that you draw it as accurately as possible. There is a sample floor plan at the back of this booklet for you to refer for inspiration.

What you'll need

You'll need:

- a floor plan grid for each house (found in the back of this booklet)
- a pencil
- an eraser in case you make a mistake
- a ruler for drawing straight lines

What you'll have to do:

Your beds are already in the system, but your zones are not. When you number your zones, start with your bedrooms and then move on to your common zones. If you get stuck and need help, contact your SWTE facilitator.





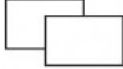
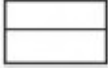



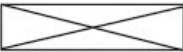
To draw the floor plan:

1. Sketch a floor plan of your house.
Use the example provided as a guide. Try to keep the rooms to scale as best you can and draw each floor separately.
2. Draw bedrooms on the floor plan and number them starting from 1. Write the number in the middle of the rooms.
3. Add beds to the bedrooms. Draw each bed in each of the bedrooms. Refer to the key below for the different bed types (single, bunks and doubles), and then number each bed.
 - Number each bed beginning with 1.
 - Bed 1 is in the first bedroom on the left when you enter the house.
 - Continue in a clockwise direction.
4. Work out how many common zones you require within the house. To do this:
 - Calculate the number of occupants you will have living their in your lowest occupancy period.
 - Subtract the number of zones that may require more than one person to keep clean each week, such as kitchens.
 - The number you get is maximum number of common zones you can have in each house.

For example, if your lowest occupancy throughout the year is six people and you have three zones that require more than one person to keep clean, then you can have a maximum of three common zones within that houses floor plan.

5. Draw a dotted line to separate the house's common zones into areas. Label each of these common areas as zone numbers, starting with the number after your bedrooms.
6. In the space at the side of the floor plan, list each zone number with the zone name next to it. Refer to the example.
7. (Optional) Draw in the doors, stairs and major appliances by referring to the key. If you don't want your plans to be that detailed, then you may omit this step.

Key to symbols

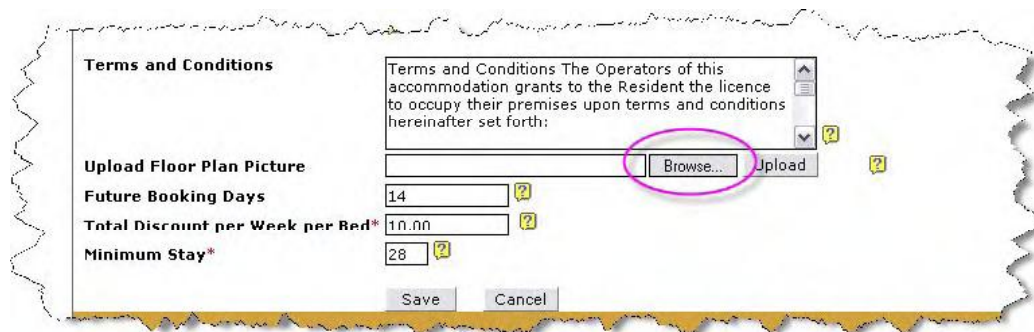
Single bed 	Cook tops 	Fridge 	Washing machine 
Bunks 	Double Bed 	Rubbish bin 	Dryer 
Staircase 	Storage, cupboards, lockers etc 		

To upload a floor plan:

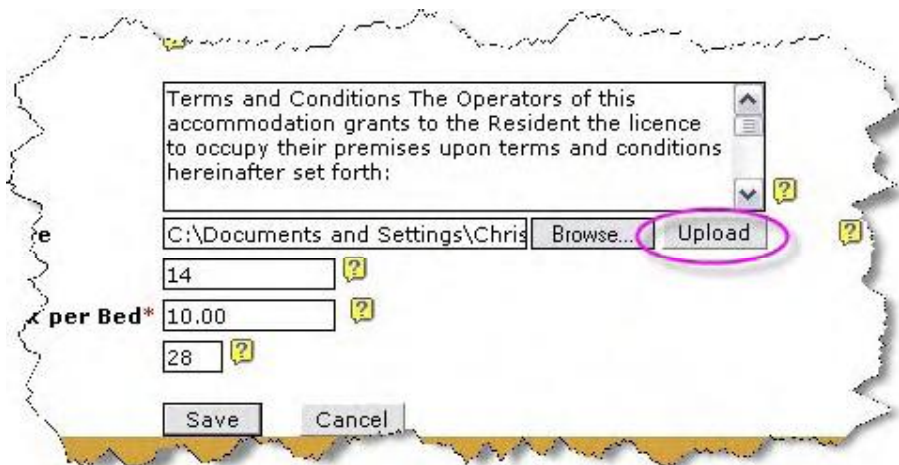
1. Scan your drawing and save it in JPG or GIF. A resolution of around 800 x 600 pixels is suitable.
2. Click **Setup Houses**.
3. Click **Edit**.



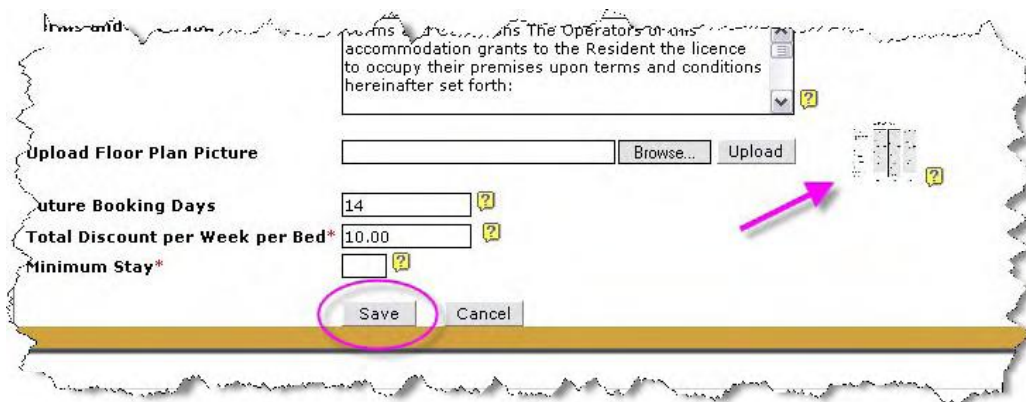
4. Scroll down the page until you can see the Upload Floor Plan Picture field.
5. Click **Browse**.



6. Locate the file on your computer and with the file name showing in the field, click **Upload**.



7. If the file uploads successfully, you will be able to see a thumbnail of it. Click **Save**.



What's next?

In the next two procedures, you'll enter your inspections and community zones in the system. You have a couple of things to think about first:

- When are you going to perform inspections?
- How much are you going to fine stayers if they fail the inspection?

Editing the House Rules for Community Task Inspections

After you've drawn your floor plan, you'll need to set up your system for community task inspections. You will need to enter the days and times of inspections.

You will see the links *Edit* and *Enter* next to the houses. Basically, you *edit* the house rules and you *enter* the house to add zones and beds etc.

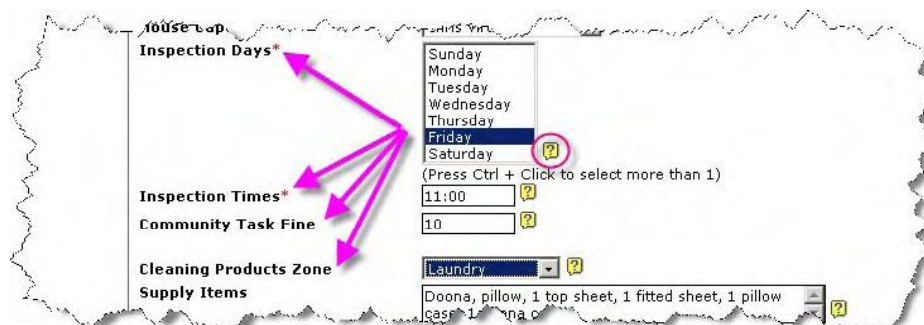
To enter community zones:

1. Click **Settings**.
2. Click **Set up houses**.
3. Click **Edit**.



4. Scroll down and complete these fields that relate to cleaning and inspections. Don't forget the settings for:

- the days that you'll conducting inspections
- the time for the inspection
- how much to fine them if they fail
- where the stayers can expect to find the cleaning products



Note: If you are unsure about what to enter, click the question mark next to the field for help.

Don't forget to click **Save** when finished.



Entering Community Cleaning Zones into the System

So far, you've drawn and uploaded a floor plan, enabled community cleaning and set up the inspection day and time. Now it's time put your community zones into the system.

To enter your community zones in the system:

1. **Enter** the house to set up zones.
2. Click **Add new zone**.

Rooms

Setup Rooms - Monkey cage

Zone no	Zone name	Zone type	Applicable gender	No. of beds	Zone status
<input type="checkbox"/> 1	Bedroom 1	Twin Share	Co-Ed	2	Active
<input type="checkbox"/> 2	Bedroom 2	Twin Share	Co-Ed	2	Active
<input type="checkbox"/> 3	Bedroom 3	Twin Share	Co-Ed	2	Active

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3. Complete all the fields as required, referring to the help if you need to, and then click **Save**. Remember to name the zones intelligently (eg Hallway 2 and Bathroom 2 etc) because this is what stayers will see in their task manager.
4. Repeat with your other zones and when you have finished, you should end up with something like this:

Setup Rooms - Abercrombie

Zone no	Zone name	Zone type	Applicable gender	No. of beds	Zone status		
<input type="checkbox"/> 1	Bedroom 1	Twin Share	Co-Ed	0	Active	Edit	Enter
<input type="checkbox"/> 2	Bedroom 2	Small Single	Co-Ed	0	Active	Edit	Enter
<input type="checkbox"/> 3	Bedroom 3	Twin Share	Co-Ed	0	Active	Edit	Enter
<input type="checkbox"/> 4	Bedroom 4	Twin Share	Co-Ed	0	Active	Edit	Enter
<input type="checkbox"/> 5	Bedroom 5	Twin Share	Co-Ed	0	Active	Edit	Enter
<input type="checkbox"/> 6	Lounge	Lounge		0	Active	Edit	
<input type="checkbox"/> 7	Kitchen	Kitchen		0	Active	Edit	
<input type="checkbox"/> 8	Rear Laundry & Bathroom	Laundry		0	Active	Edit	
<input type="checkbox"/> 9	Courtyard	Courtyard		0	Active	Edit	
<input type="checkbox"/> 10	Stairs & Hallways	Hallway		0	Active	Edit	

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What's next?

Now that you've set up your community cleaning zones, you should assign stayers to clean them.

Assigning Community Cleaning Zones to Stayers

After you've set up your community zones, you need to assign stayers to them otherwise they'll never get cleaned!

To assign zones to stayers:

1. Click **Task manager**.
2. Click **Community tasks**.
3. Select the stayer to assign a zone.
4. Select a zone for the stayer from the list.
5. Click **Assign**.

The screenshot shows the 'Community tasks' page. On the left is a sidebar with 'Task manager' highlighted. The main content area has a search bar at the top. Below it, the 'Community tasks' tab is active. A table lists stayers: Michelle Monkey (checked), Zac Monkey, Milly Monkey, Basil Monkey, and Fred Monkey. Below the table, the 'Assign Area' dropdown is open, showing a list of areas. The 'Assign' button is highlighted. The 'Inspection days' is set to Friday and the 'Inspection time' is 11:00.

6. Repeat for your remaining stayers and you should end up with something like this.

The screenshot shows the 'Community tasks' page after assignments. The table now shows the assigned zones for each stayer. The 'Assign Area' dropdown is still open, and the 'Assign' button is highlighted. The 'Inspection days' is set to Monday and the 'Inspection time' is 16:00.

Stayer name	Zone no.	Area name	Recommended no. of people
<input type="checkbox"/> Michelle Monkey	4	Dining and hall	1
<input type="checkbox"/> Milly Monkey	5	Kitchen	2
<input type="checkbox"/> Basil Monkey	5	Kitchen	2
<input type="checkbox"/> Fred Monkey	7	Bathroom	1
<input type="checkbox"/> chris virtue	8	Rubbish	1
<input type="checkbox"/> Zac Monkey	9	Laundry	1

The stayers will each receive an email informing them to log in and look at their task list.

What's next?

If you're implementing electronic check-ins, then go on to the next procedure, otherwise, go to *Adding a New House to the System* if you have more houses. If you don't have any more houses to add, then that's it.

Customising Your Terms of Stay

If you're implementing on-line stayer agreements, you have to customise your terms of stay before you can set up your agreement terms. The terms of stay are generic and are what your stayers agree to when they book a bed at your property. You can choose which of them are appropriate for your business.

Don't confuse terms of stay with the the on-line agreement. The on-line agreement is for when stayers are ready to move in and is part of the check-in procedure.

To customise your terms of stay:

1. Click **Settings**.
2. Click **Customise terms of stay**.

The screenshot shows the SWTE Accommodator interface. On the left is a sidebar menu with options like 'My Workplace', 'My Tasks', 'My Messages', 'My Notices', 'Staff Requests', 'Task manager', 'Process Requests', 'Manage Stayers', 'Communities', 'Inventory', 'Reward Programs', 'Notice Board', 'Jobs', 'Settings', 'Sales', 'Accounting', and 'Support'. The 'Settings' option is highlighted. In the main content area, there's a table with financial data (Money in, Money out, Total balance, Cash in, Cash out, Cash balance, Arrivals today, Departures today, Bed change today, Total beds, Empty beds, Beds for sale). Below this is a search bar for 'User nick name'. A link 'Customize terms of stay' is circled in pink. Other links include 'Create new user', 'Show floor plan', 'Operator details', 'Staff types', 'Staff members', 'Contract types', 'Agreement terms', 'Query templates', 'Setup houses', 'All House rates', and 'Holidays'. Below the search bar is a 'Check in questions' section with a 'Printable' link. The 'SWTE Terms and Conditions of Usage' section contains two checkboxes: 'You acknowledge that you have read the Term & Conditions of Use ("TACOU") contained on the www.swte.com website in relation to the use of this software and agree to be bound by the terms and conditions therein.' and 'SWTE may provide you with access to internet banking services for you to make credit card and direct debit payments to your accommodation provider (Accommodator), through the SWTE software. Being provided Access to a direct debit facility will be dependent on amongst other matters, whether you sign a direct debit authority form with the relevant Accommodator.'

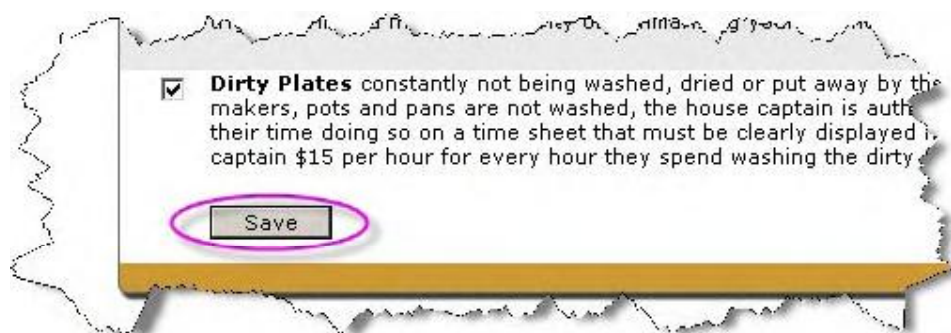
3. Read each of the terms, scrolling down the page to see all. Tick the items that you want and leave the items that you don't want unticked.

The screenshot shows the 'Your Terms' section of the SWTE Accommodator interface. It contains a list of terms of stay, each with a checkbox. The first two checkboxes are checked and circled in pink. The terms are: 'The Accommodator is {OperatorName}', 'The Stayer is {LodgerName}', 'You are moving into house {HouseName}, {ZoneName}', 'Your contract commences on {StartContractDate}', 'You have booked for a duration of {NumberOfDays} day(s)', 'Your contract comes to an end on {EndContractDate}', 'Your weekly rent would be {WeeklyRent} and the amount will be due every {DateBookedFor}', 'Your key deposit amount is {DepositAmount}', and 'The following items are supplied to you : {SupplyItems}. If not returned in full and clean a cost of \$150 will be charged from your deposit.' Below this is a question 'Do you agree that the information above is correct?' with a 'Yes' button. The next section is '10 Commandments (Accommodator)', which contains two items: 'COMMUNITY CLEANING TASK' (checked) and 'REWARD TASKS' (unchecked and circled in pink). The 'REWARD TASKS' item describes how reward points can be earned and used for discounts.

In the example above, this accommodator doesn't offer reward tasks, so it's been left unchecked.

Note: the text in the curly brackets represents variables that are from your settings.

4. When you've finished reviewing each of the terms and made your selections, click **Save** at the bottom of the page.



What's next?

Now that you have customised your terms of stay, the system is almost ready for on-line agreements. Next, we'll set up your agreement terms.

Setting Up the Agreement Terms

The purpose of electronic check-ins is to get new stayers to agree to your terms and conditions on-line. When a stayer has books and has paid a deposit for a bed or room in your place, the very next time they log in they are forced to agree to terms and conditions. If you can get them to do this before they arrive, so much the better because it will streamline the arrival process.

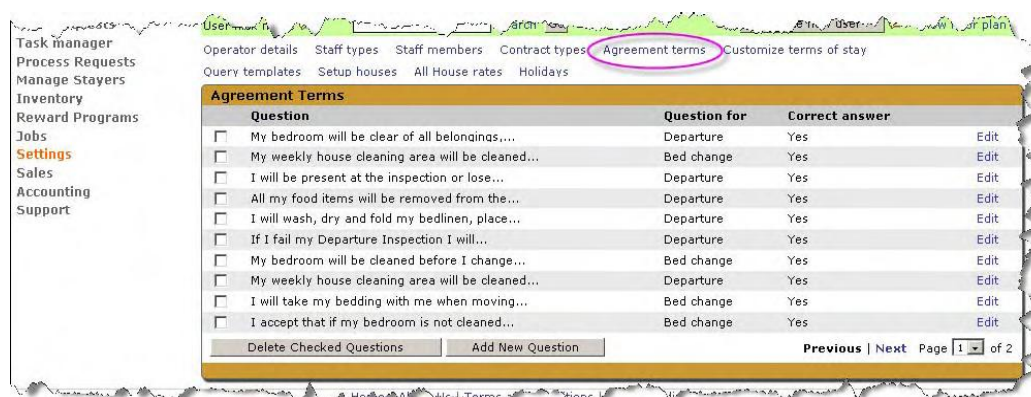
You'll need to set up your terms and conditions before they can do this. It's not hard and you'll find that it is already set up for you. All you have to do is check and modify it as necessary.

Remember these are the terms your stayers must agree to before they are permitted to live in your house. To maintain your creditability, don't put anything in here that you are not prepared to enforce.

Note: Agreement terms cover more than terms of stay. They also cover bed changes and departures. For instance, if stayers want to change beds they must accept your terms first. It's same when giving notice.

To set up your agreement questionnaire:

1. Click **Settings**.
2. Click **Agreement terms**.



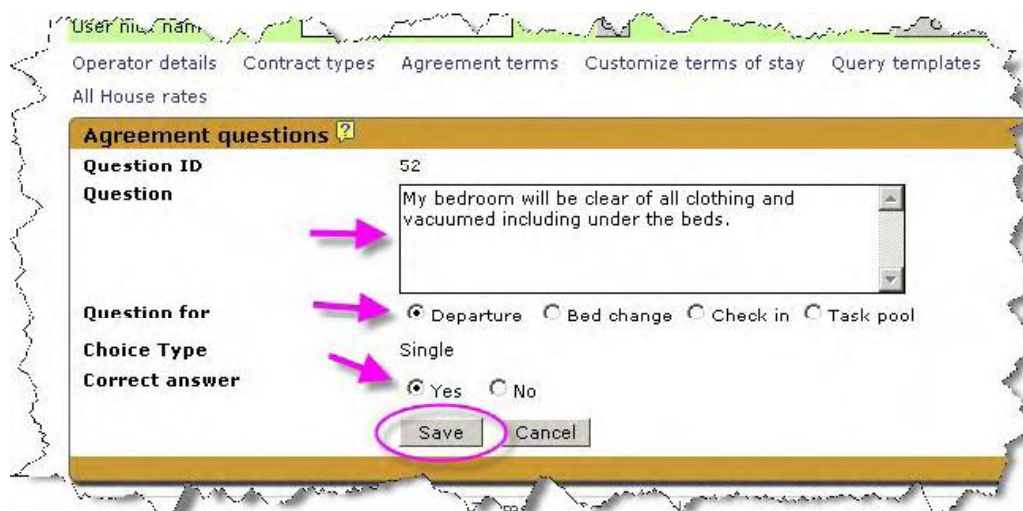
3. To view and edit a term:



Question	Question for	Correct answer	
<input type="checkbox"/> My bedroom will be clear of all clothing...	Departure	Yes	Edit
<input type="checkbox"/> My weekly house cleaning area will be cleaned.	Departure	Yes	Edit
<input type="checkbox"/> I will be present at the inspection or lose...	Departure	Yes	Edit
<input type="checkbox"/> My food box and the shelf it sits on will...	Departure	No	Edit

Click **Edit** next to the item to work with.

4. Edit as required, paying attention to where it belongs and what the “correct” answer is. Click **Save** when finished.



User name

Operator details Contract types Agreement terms Customize terms of stay Query templates

All House rates

Agreement questions ?

Question ID 52

Question My bedroom will be clear of all clothing and vacuumed including under the beds.

Question for ☒ Departure ☐ Bed change ☐ Check in ☐ Task pool

Choice Type Single

Correct answer ☒ Yes ☐ No

Save Cancel

5. To delete a question select the question and click **Delete checked item**.

6. To add a new item, click **Add new item**.



receiving My bedroom is not cleaned...

Bed change Departure Yes

Add New Question Previous | Next

out Us | Terms and Conditions | Privacy Policy

What's next?

If you want to add more properties to your system, then go on to the next procedure. Otherwise, that's it for configuring the system.

Adding a New House to the System

If you have more houses in your operation, you'll want to add them to the SWTE system.

Before you begin


Before you add a new house to the system, you should draw your floor plan because that will give you a reference to work from.

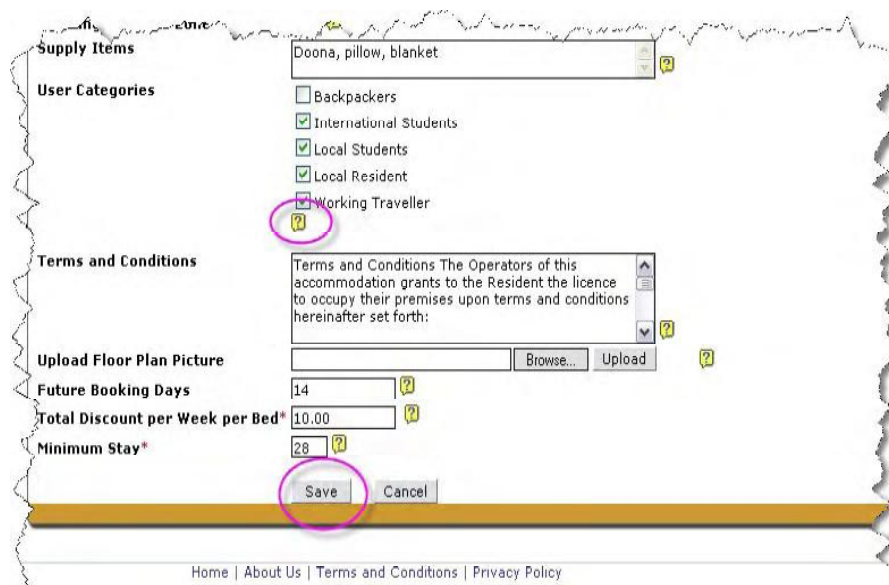
To add another house to the system:

1. Click **Settings**.
2. Click **Set up houses**.
3. Click **Add new house**.



4. Complete all the fields as required on the Setup house screen and click **Save** when finished.

Remember that if you can always get help by clicking the question marks .



5. Your new house is displayed. **Enter** it to add bedrooms and zones.

Name	Address	Total beds	Beds for sale	Edit	Enter	Pictures
Monkey cage	Meet at the Fox and Hounds in the public...	8	0	Edit	Enter	Pictures
Gorilla Cage	Meet at the Fox and Hounds on Thursdays for...	6	2	Edit	Enter	Pictures
Orangutan Cage	Meet at the Fox and Hounds in the public...	0	0	Edit	Enter	Pictures

[Add new house](#) [Previous](#) | [Next](#) Page 1 of 1

6. Click **Add new zone**.

Money out \$ 0.00 Cash out \$ 0.00 Departures today 0 Empty beds 1
Total balance \$ 300.00 Cash balance \$ 300.00 Bed change today 0 Beds for sale 2

User nick name Search [Go](#) [Create new user](#) [Show floor plan](#)

Zones Rack rates

Zone no	Zone name	Zone type	Applicable gender	No. of beds	Zone status
No zone found.					

[Add new zone](#) [Suspend zone](#) [Activate zone](#) [Delete zone](#) [Back](#)

Complete the fields as required and click **Save**.

The screen for a community zone should like this:

Setup zones

Zone No

Zone Name*

Zone Description*

Zone Type

Applicable Gender

Allow Smoking ☐

Recommended No. Of People To Maintain The Zone*

[Save](#) [Cancel](#)

While the screen for a bedroom, looks like this:

User nick name Search Create new user

Zones Rack rates

Setup zones

Zone No

Zone Name*

Zone Description*

Zone Type

Applicable Gender

Allow Smoking ☐

Recommended No. Of People To Maintain The Zone*

7. When you've finished adding zones and bedrooms, your set up should look something like this:

Zone no	Zone name	Zone type	Applicable gender	No. of beds	Zone status
<input type="checkbox"/> 1	Bedroom 1	Twin Share	Co-Ed	0	Active Edit <input type="button" value="Enter"/>
<input type="checkbox"/> 2	Bedroom 2	Small Single	Co-Ed	0	Active Edit Enter
<input type="checkbox"/> 3	Bedroom 3	Twin Share	Co-Ed	0	Active Edit Enter
<input type="checkbox"/> 4	Bedroom 4	Twin Share	Co-Ed	0	Active Edit Enter
<input type="checkbox"/> 5	Bedroom 5	Twin Share	Co-Ed	0	Active Edit Enter
<input type="checkbox"/> 6	Lounge	Lounge		0	Active Edit
<input type="checkbox"/> 7	Kitchen	Kitchen		0	Active Edit
<input type="checkbox"/> 8	Rear Laundry & Bathroom	Laundry		0	Active Edit
<input type="checkbox"/> 9	Courtyard	Courtyard		0	Active Edit
<input type="checkbox"/> 10	Stairs & Hallways	Hallway		0	Active Edit

Add new zone Suspend zone Activate zone Delete zone Back Previous | Next Page 1 of 2

8. Enter the bedrooms to add beds. Click **Add beds**.

Note: You can only add beds to bedrooms because only bedrooms are listed in the search engines and it's important that you describe your bedrooms accurately.

9. Give the bed a unique bed number and a description. If you have a special rate, different to the standard rate, for this bed, then enter it on this screen. If you don't, then leave the rates as zero and SWTE will get them from the standard contract rate. Click **Save** when finished.

The screenshot shows the 'Setup beds' form. At the top, there's a header with 'Total balance \$ 300.00', 'Cash balance \$ 300.00', 'Bed change today 0', and 'Beds for sale 0'. Below this is a search bar with 'User nick name' and a 'Search Go' button. The main form area has a title bar 'Setup beds'. It contains the following fields: 'Bed No.*' with value '11', 'Bed Description*' with value 'Single bed', 'Bed room Type' with value 'Twin Share', and 'Special Bed Rates' with 'Weekly' and 'Daily' both set to '0.00'. At the bottom, there are 'Save' and 'Cancel' buttons. The 'Save' button is circled in red.

Remember that if you set special rates on your beds, you will have to come back to this screen for those beds whenever you have a rate change. Unless you have a need to set special rates, you're better off with standard rates that you can manage from the one screen.

10. When you've finished adding beds to a bedroom, your screen should look something like this:

The screenshot shows the 'Setup beds - Orangutan Cage, Bedroom 1' screen. It features a table with the following data:

Bed no.	Bed room type	Bed description	Weekly rate	Daily rate
<input type="checkbox"/> 11	Twin Share	Single bed	0.00	0.00
<input type="checkbox"/> 12	Twin Share	Single bed	0.00	0.00

Below the table, there are buttons for 'Add new bed', 'Delete beds', and 'Back'. The 'Back' button is circled in red. At the bottom right, there are links for 'Previous', 'Next', and a page indicator 'Page 1 of 1'.

Click **Back**.

11. Continue to add beds to the remaining bedrooms. Make sure that you have the correct number of beds in each room. When you have finished, your screen should look something like this:

Total balance: \$0.00 Cash balance: \$400.00 Balance today: Beds for sale:

User nick name: Search Create new user Show floor plan

Rooms House Rates

Setup Rooms - Orangutan Cage

Zone no	Zone name	Zone type	Applicable gender	No. of beds	Zone status		
<input type="checkbox"/> 01	Bedroom 1	Twin (large)	Co-Ed	2	Active	Edit	Enter
<input type="checkbox"/> 02	Bedroom 2	Twin (large)	Co-Ed	2	Active	Edit	Enter
<input type="checkbox"/> 03	Bedroom 3	Twin (large)	Male	2	Active	Edit	Enter
<input type="checkbox"/> 04	Bedroom 4	Twin (large)	Female	2	Active	Edit	Enter
<input type="checkbox"/> 05	Dining and hall	Dining		0	Active	Edit	
<input type="checkbox"/> 06	Downstairs bath and laundry	Hallway		0	Active	Edit	
<input type="checkbox"/> 07	Kitchen	Kitchen		0	Active	Edit	
<input type="checkbox"/> 08	Upstairs bath & stairs	Bathroom		0	Active	Edit	
<input type="checkbox"/> 09	Backyard	Backyard		0	Active	Edit	
<input type="checkbox"/> 10	Lounge	Living room		0	Active	Edit	

Previous | Next Page 1 of 1

What's next?

If your house is already operating, then you'll need to get your stayers into the system. Refer to your SWTE Start documentation if you need more information.

If your using community cleaning, you'll need to set them up. Refer to the earlier sections in this book.

Section 3 — The SWTE Pro Tour

In the previous section, we looked at how to configure your system to enable community tasks and on-line agreements. In this section we look at how to use SWTE Pro's features.

We'll be working our way down SWTE's left hand menu, pausing to look at what each of these function do and how to use them.

This part is an overview of how the workplace pages work. It's a basic tour of what the various bits and pieces do. Some of it you should be already familiar with through SWTE Start or SWTE Landlord or Home.

If you haven't already done so, log on to the system as staff using your SWTE name and password.

My Workplace

You will be already familiar with this. This page gives a quick look at the state of play in your properties. You can see that the screen is in three parts:

Welcome simon Friday, September 29, 2006 10:38 AM | [Change Login](#) | [Log out](#)

My Workplace

Money in	\$ 300.00	Cash In	\$ 300.00	Arrivals today	0	Total beds	6
Money out	\$ 0.00	Cash out	\$ 0.00	Departures today	0	Empty beds	0
Total balance	\$ 300.00	Cash balance	\$ 300.00	Bed change today	0	Beds for sale	0

User nick name Search [Go](#) [Create new user](#) [Show floor plan](#)

SWTE's most wanted

Stayer Name	Reason	Home	Bed	Billing day	Amount due	Deposit
Michelle Monkey	Late Rent	Monkey cage	11	Wednesday	\$ 300.00	\$ 180.00
Milly Monkey	Late Rent	Monkey cage	32	Thursday	\$ 300.00	\$ 190.00
Zac Monkey	Late Rent	Monkey cage	31	Friday	\$ 300.00	\$ 180.00
Fred Monkey	Late Rent	Monkey cage	21	Sunday	\$ 150.00	\$ 180.00
Basil Monkey	Late Rent	Monkey cage	12	Monday	\$ 150.00	\$ 230.00

[Show More...](#)

Available task pool

Priority	Description	Category	Home	Due Date	Due Time
<input type="checkbox"/> High	Departure inspection	Departure Inspection	Orangutan Cage	26/09/2006	11:30 AM
Perform departure inspection for Bed number 22 in Orangutan Cage					

[Accept task!](#) [Show More...](#)

[Home](#) | [About Us](#) | [Terms and Conditions](#) | [Privacy Policy](#)

- The grey section at the top is a summary of money in and out, the number of arrivals and departures, and bed data.
- The green bar is on every screen and provides quick access to all your stayers' accounts.
- The blue section has items that require your attention:

SWTE's most wanted has late rent, low deposit and fines owing etc.

Available task pool shows a list of staff tasks that have not been picked up, such as departure inspections.

The Green Bar

The green bar is on every accommodator and staff screen. It provides easy access to user accounts and the floor plan. You can also create a new account for a stayer here and you can search for stayer accounts if you don't know a stayer's user name.



Refer to your SWTE Start guide if you need more information.

My Tasks

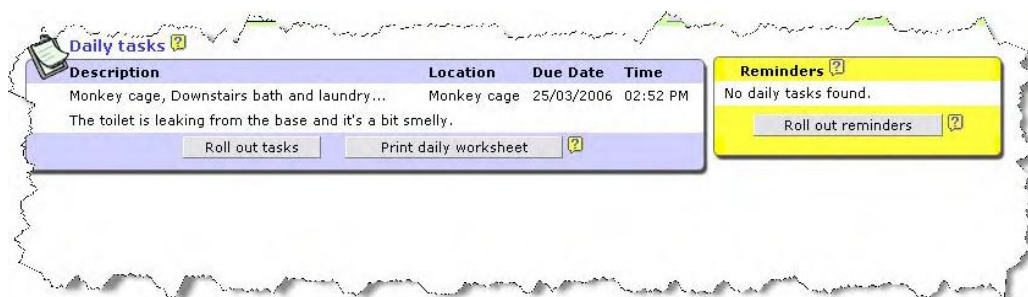
There are two parts to this screen.

- Daily tasks – these have to be rolled out every day and responsibility taken for
- Reminders – these are not accountable, but should be done.

There are two types of tasks:

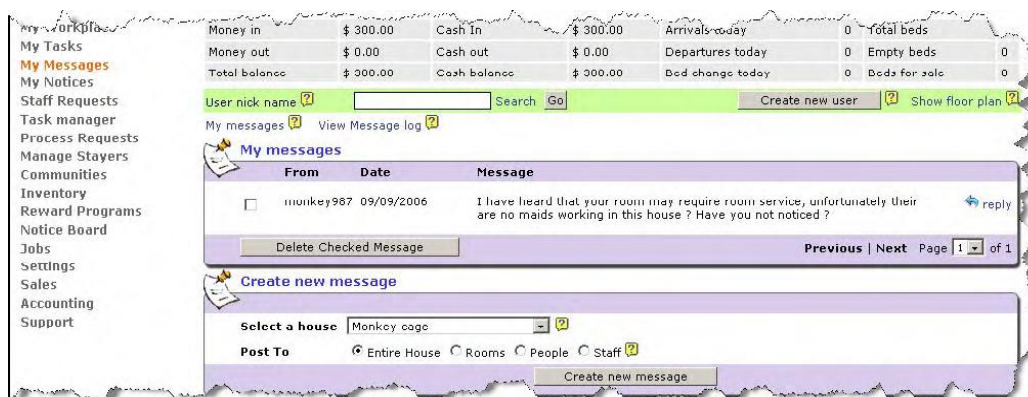
- system generated tasks that come in from your stayer base which are approved first, before being allocated to individual staff members.
- recurring staff tasks can be set by you within your task manager.

Tasks can be rolled out to staff members. If staff leave, you can easily apply their tasks to new staff. We'll show you how to do this when we look at the task manager later.



My Messages

You should be familiar with SWTE's messaging system. If you need more information, refer to the SWTE Start Accommodator Guide.



My Notices

You should be familiar with SWTE's notices. If you need more information, refer to the SWTE Start Accommodator Guide.

Staff Requests

If you have staff, they can use this section to make maintenance, purchases, cash and contractor requests. All requests must be approved by a management level staff member before becoming a task to be completed and accounted for. It's similar to the request pages in the stayer pages, but with more functionality.

Staff can make:

- maintenance requests just as stayers can
- purchase requests when they need to buy something for the house
- cash requests when they either need cash for some form of expense, (e.g. something they had to buy, payment of wages etc.) These requests reflect in the accounting pages, which we'll see later.
- contractor requests when they need to get a contractor to perform some work on the property.

The screenshot shows the 'Maintenance request' form. On the left is a sidebar menu with options: Staff Request, Task manager, Process Requests, Manage Stayers, Communities, Inventory, Reward Programs, Notice Board, Jobs, Settings, Sales, Accounting, and Support. The main content area has tabs for 'Maintenance request', 'Purchase request', 'Cash request', and 'Contractor request'. The 'Maintenance request' tab is active, showing instructions: 'With this form you can request maintenance for your house, just as you can in the office with the maintenance request forms. After you have filed your maintenance request, it will be prioritized by management, and you will receive an E-mail about the progress of your request. Make sure you explain yourself well exactly where in the house the problem is, and don't forget to mention where exactly the house the problem is! A description of, for example, 'shower not working' is not enough in a house with 4 showers! Being precise will help us to fix the problem sooner.' Below the instructions are fields for 'Select a house*' (a dropdown menu), 'Subject*' (a text input), and 'Description*' (a large text area). At the bottom are 'Submit' and 'Cancel' buttons.

Task Manager

This is your control centre. From here you can keep on top of all the tasks in your operation.

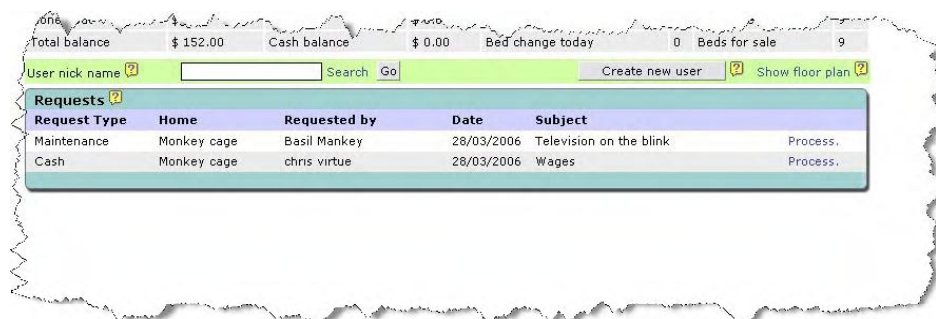
You can:

- assign staff to tasks
- see what tasks haven't been picked up and assign them to staff
- assign tasks to stayers that you're willing to pay them for
- manage community tasks
- record the results of community and reward task inspections

The screenshot shows the 'Task Manager' interface. The sidebar menu is the same as in the previous screenshot. The main content area has tabs for 'Manage Staff Tasks', 'Outstanding staff tasks', 'Reward tasks', 'Unclaimed reward tasks', 'Community tasks', and 'Task progress'. The 'Manage Staff Tasks' tab is active, showing a table of tasks. Above the table are filters: 'Select a house' (Monkey cage), 'Select a staff' (All Staff), and 'All Recurrences'. The table has columns: 'Job name', 'Category', 'House', 'Priority', and 'Assigned to'. The first task listed is 'Daily banking' with category 'Daily chores by staff', house 'Monkey cage', and priority 'High'. Below the table are buttons: 'Delete jobs', 'Assign Staff', 'Assign', 'Create task', and 'Previous | Next | Page 1 of 1'. At the bottom of the page are links: 'Home | About Us | Terms and Conditions | Privacy Policy'.

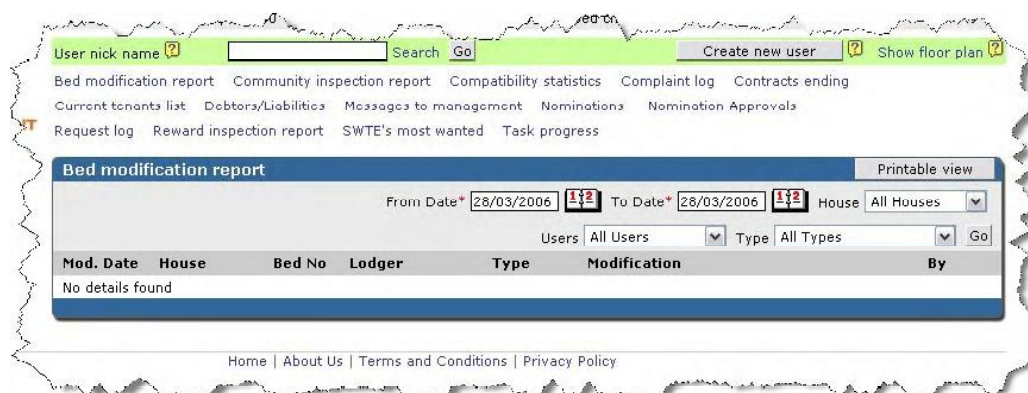
Process Requests

You will have seen the request processor in SWTE Start. As you approve requests, you can assign them to staff as tasks.



Manage Stayers

Everything to do with managing your stayers happens under *Manage Stayers*.



There's quite a lot of functionality here. Let's look at what happens under the links:

- **Current tenants** list gives a list of who's in your houses, their contract period, rent, who referred them and the terms they agreed to.
- **Adjust beds** allows you to move a stayer from one bed to another without them having to put in a change bed request.
- **Arrivals today** is a list of new stayers who are due to move into your properties.
- **Bed modification report** shows you when the status of bed changes from empty to occupied to departed by whom and when. It provides an overview of that bed's history. You can filter by house, stayer, date range and more.
- **Compatibility statistics** shows the overall results of the compatibility survey
- **Complaint log**
- **Contracts ending** gives you an outlook to your future bed status beyond the minimum departure notice period. You can see whose contracts are ending up to four weeks in advance so that you can either get the stayer to renew or start selling the bed.
- **Stayer Queries** is where you deal with follow-up messages from stayers they sent you via the query templates
- **Community inspection** report shows you at glance how your stayers are doing in their mandatory tasks.
- **Nominate a stayer** – you can nominate stayers for reward or penalties.

- **Process Nominations** – when staff or stayers nominate someone for a reward or a penalty, this is where you can approve or decline the nomination.
- **Pending Departures** is a list of stayers who have submitted their notice. You can check them out from this screen.
- **Request log** is a list of all the requests, filtered by date and house, whether they be processed or not.
- **SWTE's most wanted** – is an active list of people who owe you money or could do very soon if not seen to. Of course, you can deal with individual stayers by typing their SWTE name into the box on the green bar on any screen within the staff pages. Most of the tasks here, stayers can perform for themselves under My Administration.

When you look up a stayer's account, you should see something like this:

User nick name Search

Account holder			
Name	chris virtue	Home	Monkey cage, Bed no. 22
Billing cycle	Monday	Date of arrival	18/09/2006
Mobile no.	92118878	Contract type	Standard contract
Total Fine	\$ 20.00	Cash backs	\$ 0.00
		Expiry date	17/09/20...
		Status	Stayer
		Rewards	650.0

Account details Pay rent Borrow stuff Manage Contract Swap beds Top up deposit Pay off fines
Give notice Check out Transactions Reward Points Waiting list Sell items Adjust rent
Convert cash & rewards Compatibility answers Contract History

Account details	
First name	chris
Last name	virtue
Account type	Backpackers
Permanent address	
City	State
Country	Postcode

A quick rundown on what you can do here:

- **Account details** allows you to edit their details, reset their password if they've forgotten it and book them in
- **Pay rent, Pay off fines** and **Top up deposit** are where you can take money off them and issue receipts.
- **Borrow stuff** – if you have any items that you lend your stayers, you can manage that here.
- **Manage Contract** is where you alter the length of a stayer's contract. They can do that themselves.
- **Swap beds** is where you can allow stayers to swap beds.
- You can **Give notice** on their behalf
- **Check** stayers **out**
- View all the **Transactions** and **Rewards Points** for the stayer, filtered by date.
- Put new stayers on a **Waiting list** if your accommodation is full
- Sell items under the rewards program.
- **Adjust rent**
- Under **Convert cash & rewards**, you can turn cash-backs (rent discounts) into rewards points
- **Compatibility answers** shows how they answered the questions in the compatibility survey.
- View their **Contract history**.

Communities

For information regarding the communities and leagues, refer to *SWTE Start Stayer Pages* — *Guide for Accommodators*.

Inventory

The SWTE system has a capability for managing inventory. Inventory falls roughly into three categories:

- stock – day to day consumables (e.g. toilet paper, cleaning aids etc)
- fixed assets – furniture and portable appliances such as TVs
- fixtures and fittings – items that are part of the house (e.g. light fittings, major appliances such as stoves and ovens)



You can also record your suppliers and contractors here, too.

The easiest way to think of the difference between a fixed asset and a fixture is that if you take it with you when you sell the house, it's a fixed asset. If you leave it behind, it's a fixture.

We'll look at this later when we get to setting up the inventory. Briefly though, a benefit of the system is that not only does it provide stock control, it also allows you to record vital information about the items in your houses. For instance, you will have light fittings all over the house, some might be incandescent, others may be flouros. Let's say that the light on the back porch isn't working. Because you've recorded all the details of the lights in the system, you can tell the electrician what type of light it is, the correct wattage and whether he needs a ladder or not.

Reward programs

We talked about this in the stayer pages. This is where you can set up reward programs, manage redemptions and add partners.

Notice board

Use the notice board to make announcements to the house. It is a really useful tool for getting them to interact with each other. Announce things like drinks and other social stuff here. Anything posted by you will be from “lodger”.

Stayers can post to the notice board. You can maintain a bit of control by deleting anything inappropriate.

The screenshot shows the 'Notice board for house' interface for 'Monkey cage'. At the top, there's a 'Post a notice' section with a 'Select a house*' dropdown set to 'Monkey cage', a 'Description*' text area, and a 'Submit' button. Below this is a list of notices. The first notice is from 'monkey6' with the description 'Piss up on Friday! Wear you drinking pants and get a skinful!' and a beer emoji. The second notice is from 'Lodger' with a single smiley face emoji. At the bottom, there are 'Delete', 'Previous', 'Next', and 'Page 1 of 1' links.

From	Description
<input type="checkbox"/> monkey6	Piss up on Friday! Wear you drinking pants and get a skinful! 🍺
<input type="checkbox"/> Lodger	😊

Jobs

If employers and agencies are looking for temporary staff, they may well come to you. The jobs you enter here will be displayed for stayers according to their primary skill sets.

The screenshot shows the 'JOBS' section of the interface. At the top, there's a summary bar with statistics: 'Total balance \$152.00', 'Cash balance \$0.00', 'Bed change today 0', and 'Beds for sale 9'. Below this is a 'JOBS' header with a 'Job Description', 'Agency', 'Hours', 'Pay', and 'Edit' column. The table lists various job postings, all from 'Geoffrey Nathan International'. At the bottom, there are 'Delete Checked', 'Add New Job', and 'Previous | Next Page 1 of 3' links.

Job Description	Agency	Hours	Pay	Edit
<input type="checkbox"/> CHEF, Heritage Restaurant The Rocks Sydney....	Test 2			Edit
<input type="checkbox"/> Telemarketers	Geoffrey Nathan International	Not Stated	\$17.50+ p/h	Edit
<input type="checkbox"/> Insurance Administrator	Geoffrey Nathan International	office hours	\$20 p/h	Edit
<input type="checkbox"/> Java Developer	Geoffrey Nathan International	office hours	\$35-\$80 p/h depending on experience	Edit
<input type="checkbox"/> Unit Pricing Analyst	Geoffrey Nathan International	office hours	\$30-\$35 p/h	Edit
<input type="checkbox"/> Help Desk Support (1st, 2nd 3rd Level)	Geoffrey Nathan International	Office Hours	\$20-30 p/h	Edit
<input type="checkbox"/> Administrators/Data Entry Operators	Geoffrey Nathan International	Office Hours	\$17-\$22 p/h	Edit
<input type="checkbox"/> Personal Assistants/Executive Assistants	Geoffrey Nathan International	Office Hours	\$20+ p/h	Edit
<input type="checkbox"/> Excel Administrator	Geoffrey Nathan International	Office hours	\$20+ p/h	Edit
<input type="checkbox"/> Receptionists	Geoffrey Nathan International	Office Hours	\$18-\$22 p/h	Edit

Settings

This is where you control all the settings for your houses and business logic. We'll look at this in a lot more detail later.

The screenshot shows the 'Settings' page in the SWTE system. On the left is a navigation menu with items: Staff Requests, Task manager, Process Requests, Manage Stayers, Communities, Inventory, Reward Programs, Notice Board, Jobs, Settings (highlighted), Sales, Accounting, and Support. The main content area has a top bar with 'User nick name' and a search box. Below this is a sub-menu: Operator details, Staff types, Staff members, Contract types, Agreement terms, Customize terms of stay, Query templates, Setup houses, All House rates, and Holidays. The 'Operator details' section is expanded, showing fields for Operator code (Taronga), Operator name (Taronga), Address (Po Box 1218, Noosa, Noosa, Queensland, Australia), Phone (0425 254 375), Fax, Email (cvirtue@inhouse.com.au), and Working hours.

Sales

By now, you should be familiar with how the sales process works. Let's just say for now that anything to with prospective stayers happens through *Sales*. That includes viewings, booking a bed right up to taking their deposit to confirm their booking. Once you have their deposit, they are no longer a prospect and are not managed from the sales pages. They then go onto the arrivals today list which is found in the *Manage Stayers* section.

The screenshot shows the 'Sales Register' page. The left navigation menu is the same as in the Settings page. The main content area has a top bar with 'User nick name' and a search box, and buttons for 'Create new user' and 'Show floor plan'. Below this is a sub-menu: Sales Register, New Accounts, Viewing list, Viewed homes, Bed status, Graphical bed status, Waiting List, Conversions, and Occupancy. The 'Sales Register' section is expanded, showing a search form with 'Ref. No.', 'Booking date' (From 22/09/2006 To 29/09/2006), 'Filter by' (All), and 'Home' (All House). Below the search form is a table with columns: Ref. No., Booking Date, Check In Date, Customer Name, Home, Bed, and Status. The table currently shows 'No records found'.

Accounting

For now we'll just say here you can see where your money's coming from and where it's going. You can access a series of useful reports as well manage your float etc.

Support

This is the last item on the menu. In here, you'll find access to upgrades, training and terms. Go here if you want to add more beds to your SWTE licence and turn on or off search engine listing.

Section 4 — Using the SWTE Pro System

In this section, we'll take you through the functionality that you won't have seen in SWTE Landlord or Home.

Like SWTE, this section is organised by task, so it should be easy to follow.

Requests

Like stayers, staff can make requests, however the staff request function has more functionality. Staff can make:

- Maintenance requests when something needs to be fixed
- Purchase requests when they need to buy something
- Cash requests when they need cash to pay for something
- Contractor requests when they need to get a tradesman in

Note: Before your staff can make purchase and contractor requests, you need to set up your suppliers and contractors in the inventory module.

All requests have to be approved by management, and for information regarding processing requests, refer to your SWTE Start accommodator guide.

Making a maintenance request

1. Click **Staff Requests** on the left menu.
2. Click **Maintenance request**.
3. Select the house.
4. Select the room where the problem is.
5. If you have set up your inventory, select the item that needs fixing (see below).
6. Type in a meaningful subject – “toilet broken” says nothing, but “toilet won’t flush” is more meaningful
7. Type in some more information in the Description field (e.g. if the toilet is leaking, where it’s leaking).
8. Click **Submit**.

The screenshot shows the 'Staff Requests' interface. On the left is a navigation menu with options: Staff Requests, Task manager, Process Requests, Manage Stayers, Communities, Inventory, Reward Programs, Notice Board, Jobs, Settings, Sales, Accounting, and Support. The 'Staff Requests' section is active, showing sub-options: Maintenance request (highlighted with a red circle), Purchase request, Cash request, and Contractor request. The main form is titled 'Maintenance request' and includes instructions: 'With this form you can request maintenance for your house, just as you can in the office with the m... you have filed your maintenance request, it will be prioritized by management, and you will receive your request. Make sure you explain yourself well exactly where in the house the problem is, and don't forget to m... the problem is! A description of, for example, 'shower not working' is not enough in a house with 4 sh... to fix the problem sooner.' The form fields are: 'Select a house*' with a dropdown menu showing 'Monkey cage'; 'Select an area in the house' with a dropdown menu showing 'Bedroom 1'; 'Select an item for maintenance' with a dropdown menu showing 'Select a item'; 'Subject*' with a text field containing 'Broken window'; and 'Description*' with a text area containing 'Glass is badly cracked and the entire pane needs replacing'. At the bottom are 'Submit' and 'Cancel' buttons.

Note: all items in fixed assets and inventory can be allocated to a house zone number from inventory. For instance, if someone selects the kitchen, all of your assets in the kitchen (such as fridge, oven etc) will be in the drop down list so that they can select the item that is broken. By selecting the specific item, all of the serial codes and model numbers as well as notes about that item will be sent along with the request so that the person allocated the job of fixing it, has all required information.

Making a purchase request

1. Click **Purchase request**.
2. Select the house.
3. Type in a meaningful subject.
4. Select a supplier
5. Enter any more useful information in the Description field.
6. List the items along with any notes and an estimated cost.
7. Click **Save**.

The screenshot shows the 'Purchase request' form. At the top, there's a summary bar with financial data: Money out (\$0.00), Cash out (\$0.00), Departures today (2), Total balance (\$750.00), Cash balance (\$750.00), and Bed change today (0). Below this is a navigation bar with 'Maintenance request', 'Purchase request' (highlighted with a red circle), 'Cash request', and 'Contractor request'. The 'Purchase request' section has a title 'Purchase request' and a brief instruction. It includes fields for 'Select a house*' (Monkey cage), 'Subject*' (Bar heaters for bedrooms), 'Description*' (There are have many complaints about the central heating not working and as it is going to take another couple of weeks to fix it, we should point some cheap bar heaters in the rooms in the meantime.), and 'Recommended supplier*' (Bob's Appliances). Below these is a table with three columns: 'Requested Item', 'Notes', and 'Estimated Price'. The table has one row filled with 'MegaHot 3 bar heater', an empty 'Notes' field, and '\$27.50 ea'. At the bottom are 'Save' and 'Cancel' buttons.

Money out	\$ 0.00	Cash out	\$ 0.00	Departures today	2
Total balance	\$ 750.00	Cash balance	\$ 750.00	Bed change today	0

User nick name [?] [] Search Go Create new user

Maintenance request **Purchase request** Cash request Contractor request

Purchase request

With this form you can submit your purchase request for your house just as you can in the office with the purchase request. After you have filed your purchase request, it will be prioritized by management, and you will receive an E-mail about your request.

Select a house* Monkey cage [?]

Subject* Bar heaters for bedrooms [?]

Description* There are have many complaints about the central heating not working and as it is going to take another couple of weeks to fix it, we should point some cheap bar heaters in the rooms in the meantime. [?]

Recommended supplier* Bob's Appliances [?]

Requested Item [?]	Notes*	Estimated Price*
MegaHot 3 bar heater		\$27.50 ea

Save Cancel

Making a cash request:

1. Click **Cash request**.
2. Select the house
3. Select what the money is for from the list.
4. Enter a detailed description.
5. Enter the amount.
6. Enter who the money is for from the Approved staff list.
7. Click **Save**.

The screenshot shows the 'Cash request' form. At the top, there's a summary bar with financial data: Total balance (\$0.00), Cash balance (\$0.00), Bed change today (0), and Beds for sale (2). Below this is a navigation bar with 'Maintenance request', 'Purchase request', 'Cash request' (highlighted with a red circle), and 'Contractor request'. The 'Cash request' section has a title 'Cash request' and a brief instruction. It includes fields for 'Select a house*' (Monkey cage), 'Subject*' (Wages), 'Description*' (Pay for Billy who's been helping out in the office.), 'Amount*' (250), and 'Approved staff*' (lchris). At the bottom are 'Save' and 'Cancel' buttons.

Total balance	\$ 0.00	Cash balance	\$ 0.00	Bed change today	0	Beds for sale	2
---------------	---------	--------------	---------	------------------	---	---------------	---

User nick name [?] [] Search Go Create new user Show floor plan

Maintenance request Purchase request **Cash request** Contractor request

Cash request

With this form you can submit your request for any form of payment. After you have filed your request, it will be prioritized by management, and you will receive an E-mail about the progress of your request.

Select a house* Monkey cage [?]

Subject* Wages [?]

Description* Pay for Billy who's been helping out in the office. [?]

(Please enter the number of hours worked in the description for a cash request)

Amount* 250 [?]

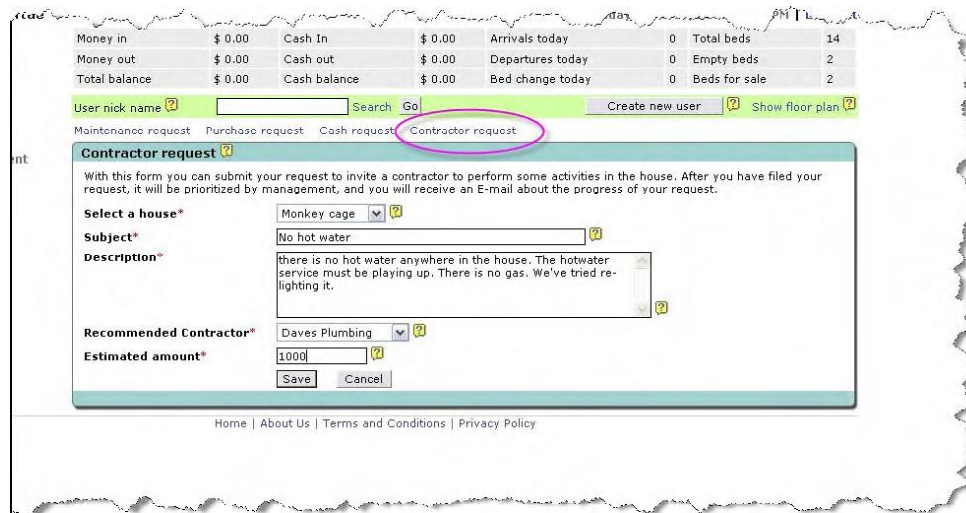
Approved staff* lchris [?]

Save Cancel

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Making a contractor request

1. Click **Contractor request**.
2. Type in a meaningful subject.
3. Enter a detailed description.
4. Select a contractor from the list.
5. Enter an estimated cost.
6. Click **Save**.



The screenshot shows the SWTE web interface. At the top, there's a table with financial and occupancy data. Below that is a navigation bar with links like 'Maintenance request', 'Purchase request', 'Cash request', and 'Contractor request' (which is circled in pink). The 'Contractor request' form is displayed, containing fields for 'Select a house*', 'Subject*', 'Description*', 'Recommended Contractor*', and 'Estimated amount*'. The 'Save' button is at the bottom of the form.

Money in	\$ 0.00	Cash In	\$ 0.00	Arrivals today	0	Total beds	14
Money out	\$ 0.00	Cash out	\$ 0.00	Departures today	0	Empty beds	2
Total balance	\$ 0.00	Cash balance	\$ 0.00	Bed change today	0	Beds for sale	2

User nick name Search Go

Maintenance request Purchase request Cash request **Contractor request**

Contractor request

With this form you can submit your request to invite a contractor to perform some activities in the house. After you have filed your request, it will be prioritized by management, and you will receive an E-mail about the progress of your request.

Select a house* Monkey cage

Subject* No hot water

Description* there is no hot water anywhere in the house. The hotwater service must be playing up. There is no gas. We've tried re-lighting it.

Recommended Contractor* Daves Plumbing

Estimated amount* 1000

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Processing Requests

All requests made by staff and stayers must be approved by management.

To process a request, click **Process**.

Request Type	Home	Requested by	Date	Subject	
Maintenance	Monkey cage	Simon Ford	29/09/2006	Broken window	Process.
Purchase	Monkey cage	Simon Ford	31/07/2006	Need to buy some cleaning products	Process.
Purchase	Monkey cage	Simon Ford	29/09/2006	Bar heaters for bedrooms	Process.
Contractor	Monkey cage	chris virtue	19/06/2006	No hot water	Process.
Contractor	Monkey cage	Simon Ford	31/07/2006	Need the sewere drain under house eeled out	Process.
Cash	Monkey cage	Simon Ford	31/07/2006	Sales Commissions	Process.
Cash	Orangutan Cage	Simon Ford	31/07/2006	Wages	Process.

Processing a maintenance request

1. Either approve or decline the request.
2. Complete all fields as necessary.
3. If declining, make sure you give a reason in the Message field.
4. Assign to a staff member for follow-up.
5. Click **Save**.

Processing a purchase request

1. Approve the supplier or select another from the list.
2. Either approve or decline the request.
3. Complete all fields as necessary.
4. If declining, make sure you give a reason in the Message field.
5. Assign to a staff member for follow-up.
6. Click **Save**.

Total balance: \$0.00 Cash balance: \$0.00 Bed change today: 0 Beds for sale: 2
 User nick name: [] Search Go Create new user Show floor plan

Purchase request

Requested by: chris virtue in Monkey cage on 19/06/2006
 Subject: Running short of cleaning products
 Description: Just had a huge spring clean
 Approve supplier: Eco Green
 Decision: ☒ Approve ☐ Decline
 Priority: 1 - High

Requested Item	Notes	Estimated Price
<input checked="" type="checkbox"/> Oven cleaner	null	\$
<input checked="" type="checkbox"/> Window cleaner	null	\$
<input checked="" type="checkbox"/> Floor polish	null	\$

Anything unchecked will not be approved.

Instructions: Just had a huge spring clean
 Message to requester: OK. They're on their way.
 Assign to: chris.virtue
 Save Cancel

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Processing a contractor request

1. Either approve or decline the request or get quotes.
2. Complete all fields as necessary, selecting alternate contractors for quotes.
3. If declining, make sure you give a reason in the Message field.
4. Assign to a staff member for follow-up.
5. Click **Save**.

Total balance: \$0.00 Cash balance: \$0.00 Bed change today: 0 Beds for sale: 2
 User nick name: [] Search Go Create new user Show floor plan

Contractor request

Requested by: chris virtue in Monkey cage on 19/06/2006
 Subject: No hot water
 Description: there is no hot water anywhere in the house. The hotwater service must be playing up. There is no gas. We've tried re-lighting it.
 Engage contractor: Daves Plumbing
 Estimated cost: \$ 1000.00
 Decision: ☐ Approve ☒ Get costing ☐ Decline
 Priority: 1 - High

Get cost from contractor:
 1. Daves Plumbing
 2. Danny Boy's Plumbing
 3. Select a contractor

Instructions: there is no hot water anywhere in the house. The hotwater service must be playing up. There is no gas. We've tried re-lighting it.
 Message to requester: We'll called for quotes
 Assign to: chris.virtue
 Save Cancel

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Processing a cash request

1. Either approve or decline the request.
2. Complete all fields as necessary, selecting alternate contractors for quotes.
3. If declining, make sure you give a reason in the Message field.
4. Click **Save**.

Request

Requested by chris virtue in Gorrilla Cageon 19/06/2006

Wages

Description for Billy who's been helping out in the office

250

☐ Approve ☒ Decline

for Billy who's been helping out in the office

This is the first I've heard of it. Who's Billy and what has he been doing?

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Any requests that have been assigned to staff will be listed in their daily tasks.

User nick name Search

Daily tasks

Description	Location	Due Date	Time
<input type="checkbox"/> Monkey cage - Running short of cleaning products Just had a huge spring clean	Monkey cage	20/06/2006	12:34 PM
<input type="checkbox"/> Monkey cage - No hot water there is no hot water anywhere in the house. The hotwater service must...	Monkey cage	20/06/2006	12:41 PM
<input type="checkbox"/> Monkey cage, Downstairs bath and laundry... Not powering up all. the natives are getting restless.	Monkey cage	21/06/2006	12:32 PM

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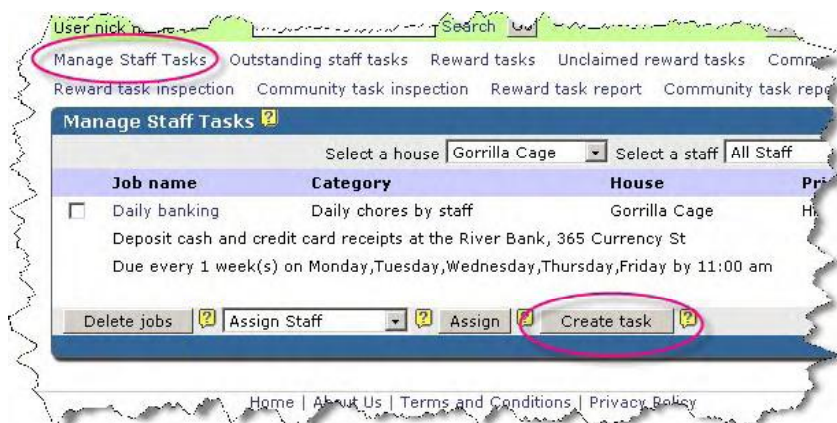
The Task Manager

SWTE Pro's task management capabilities are very powerful. You can use the task manager to set up tasks for staff to perform, including regularly recurring tasks that have to be performed every so often.



Creating and Assigning Staff Tasks

1. Click **Manage Staff tasks**.
2. Click **Create task**.



3. Complete fields as required on the new task screen, referring to the example below:

Staff task manager

Home: Monkey cage

Task category: Daily chores by staff

Job name*: Daily banking

Description*: Deposit cash and credit card receipts at the River Bank, 365 Currency St

Priority: High

Roll Out Task: ☒

Task Start date: 26/06/2006

Due Time*: 11-12 AM

☐ Occur once: On

☐ Daily: Every day(s)

☒ Weekly: Every 1 week(s) on

☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday

The First

☐ Monthly: ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

of every month(s)

The First

☐ Yearly: ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday ☐ Sunday

of every January

Save Cancel

This is a recurring task that is to be completed every work day between 11 and 12 AM.

Staff task manager

Home: Gorrilla Cage

Task category: Daily chores by staff

Job name: New barbecue

Description: Prepare courtyard for barbecue installation

Priority: High

Roll Out Task: ☒

Task start date: Not applicable for tasks which occur once.

Due Time: 4-5 PM

Occur once: On 27/06/2006

Daily: Every 1 day(s)

Weekly: Every 1 week(s) on Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Monthly: The 1st of every 1 month(s) Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Yearly: The 1st of every January Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Save Cancel

This is a one-off task.

4. Click **Save**.

5. Refresh the lists by clicking **Go**.

Manage Staff Tasks

Select a house: All Houses Select a staff: All Staff All Recurrences: All Go

Please choose a house and staff to view the task list

Delete jobs Assign Staff Assign Create task Previous Next Page 1 of 0

6. To assign a task to a staff member, click the check box next to the task, select a staff member from the list and then click **assign**.

Staff task manager

Select a house: Gorrilla Cage Select a staff: All Staff All Recurrences: All Go

Job name	Category	House	Priority	Assigned to
<input checked="" type="checkbox"/> Daily banking	Daily chores by staff	Gorrilla Cage	High	
Deposit cash and credit card receipts at the River Bank, 365 Currency St				
Due every 1 week(s) on Monday,Tuesday,Wednesday,Thursday,Friday by 11:00 am				

Delete jobs Michelle Monkey Assign Create task Previous Next Page 1 of 1

Managing Outstanding Staff Tasks

To help you better manage your staff, you can view staff tasks that have not been completed. You can also assign tasks to another staff member if you want.

To view outstanding staff tasks:

1. Click **Task Manager**.
2. Click **Outstanding staff tasks**.
3. Filter by house, staff member and status as required.
4. Click **Go**.

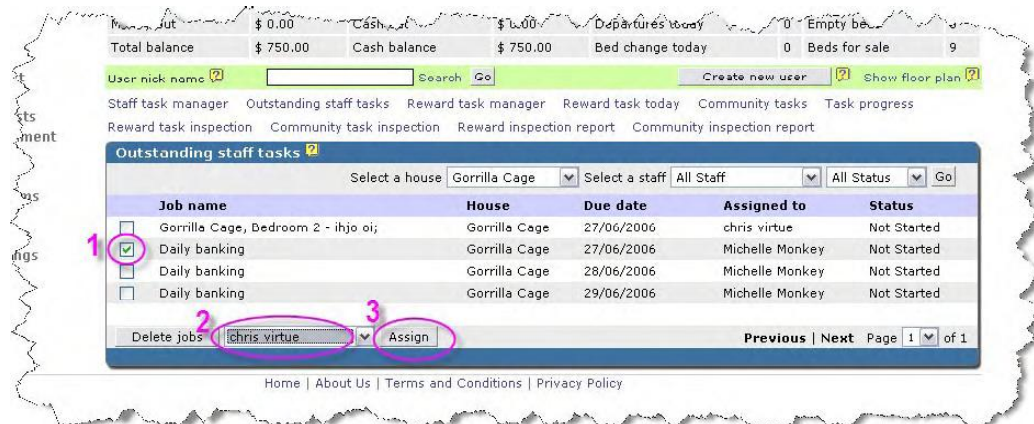


5. A list of outstanding tasks is displayed.

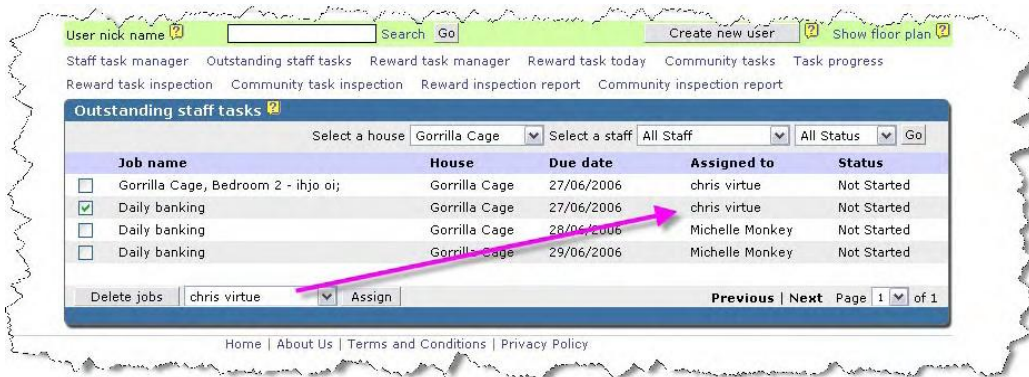


To assign an existing task to another staff member:

1. Select the task to be re-assigned.
2. Select the staff member to give the task to from the list.
3. Click **Assign**.



4. The list updates.



To delete a task:

1. Select the task to be deleted.
2. Click **Delete**.



Managing Reward Tasks

Reward tasks allow you to offer responsibility for some tasks to your stayers. These tasks are placed directly into the stayers' task pool for them to accept.

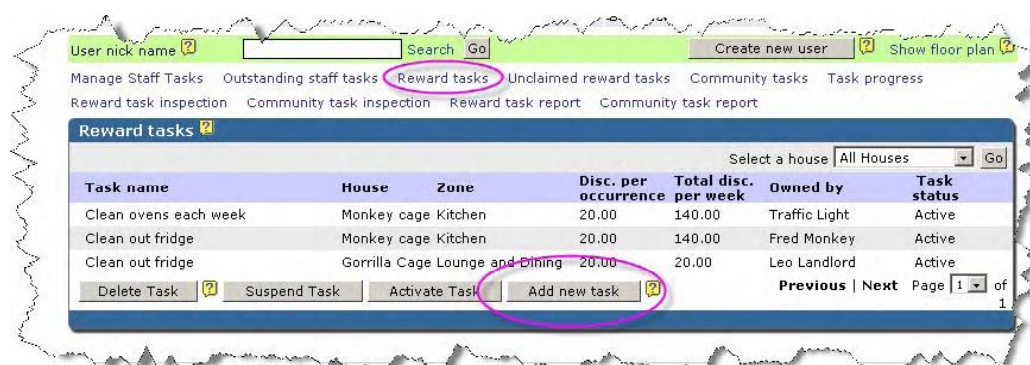
Make sure that you describe the task properly so there is no confusion as to what needs to be done, where they can find cleaning products and to what standard you expect the job to be done.

Note (1): You will only be able to set tasks to the value of the total points you have allowed per property in your property set-up.

Note (2): When reward tasks are picked up by stayers, the system updates at 2:00 AM.

To create a new reward tasks:

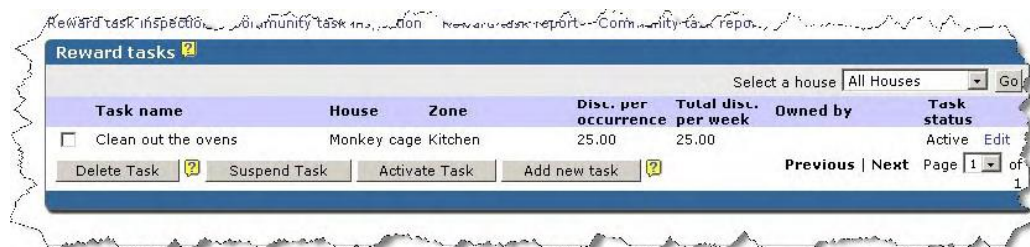
1. Click **Task manager**.
2. Click **Reward tasks**.
3. Click **Add new task**.



4. Complete all the required fields and Click **Save**.

The screenshot shows the 'Add new task' form. At the top, there are navigation tabs: 'Manage Staff Tasks', 'Outstanding staff tasks', 'Reward tasks' (highlighted), 'Unclaimed reward tasks', 'Community tasks', and 'Task progress'. Under 'Reward tasks', there are sub-tabs: 'Reward task inspection', 'Community task inspection', 'Reward task report', and 'Community task report'. The form is titled 'Reward tasks' and includes the following fields: 'House*' (dropdown menu set to 'Monkey cage'), 'Task Name*' (text input field with 'Clean out the ovens'), 'Task Description*' (text area with 'Clean out the ovens with oven cleaner. The oven cleaner is under the sink. Make sure you read the instructions on the can!'), 'Room' (dropdown menu set to 'Kitchen'), and 'Discount per Occurrence*' (text input field with '25'). Below these fields is a table with columns: 'Due Day', 'Inspection Day', and 'Inspection Time'. The 'Due Day' column has a dropdown menu set to 'Tuesday'. The 'Inspection Day' column has a checkbox checked. The 'Inspection Time' column has a text input field with '16:30'. At the bottom of the form, there are 'Save' and 'Cancel' buttons. The 'Save' button is circled in pink.

5. The new task is added to the list.



Assigning a Reward Task to a Staff Member

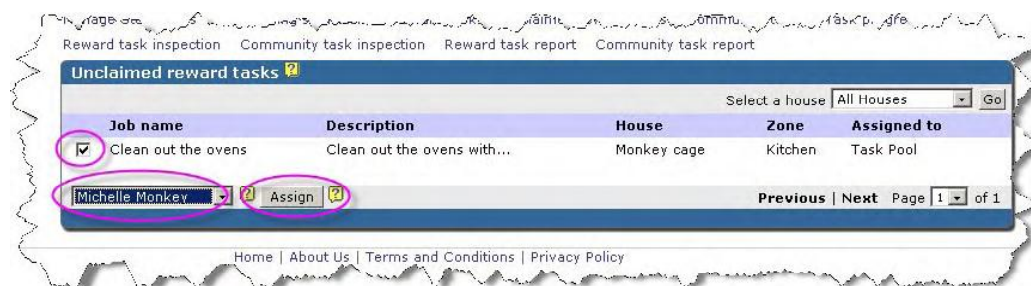
You can assign unclaimed reward tasks to staff. You cannot do this until the day that the task is due.

To assign a reward task to a staff member:

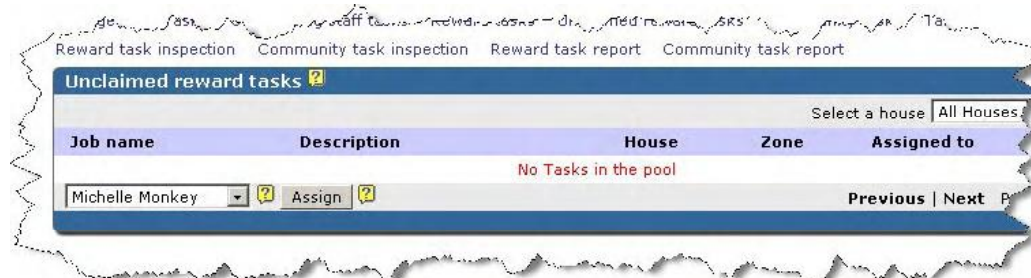
1. Click **Task manager**.
2. Click **Unclaimed reward tasks**.



3. Select the task to be assigned.
4. Select a staff member from the list.
5. Click **Assign**.



6. The task is removed from the task pool.



Managing Community Tasks

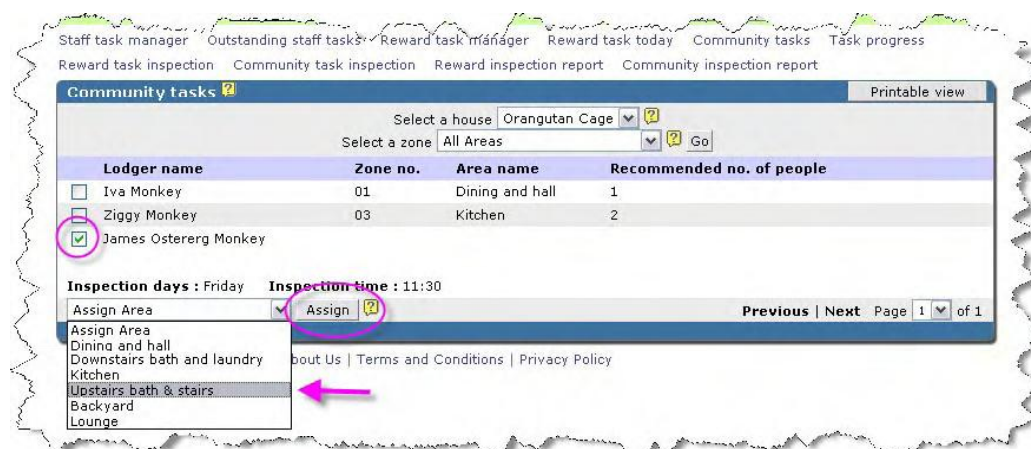
Generally, you'll assign a stayer an area to keep clean as part of the arrival procedure. Use this procedure if you need to change a stayer's assigned area or to assign an area to a stayer that doesn't have one.

To run the cash in hand report:

1. Click **Task manager**.
2. Click **Community tasks**.



3. Select the stayer to assign the area to.
4. Select an area from the list.
5. Click **Assign**.



6. The list updates:



Monitoring the Progress of Tasks

You can get an overview of where the progress of assigned tasks.

To run the debtors and liabilities reports:

1. Click **Task manager**.
2. Click **Task progress**.
3. Filter by date, house, staff and status if you need to.
4. Click **Go**.

user nick name search Go create new user show floor plan

Staff task manager Outstanding staff tasks Reward task manager Reward task today Community tasks **Task progress**

Reward task inspection Community task inspection Reward inspection report Community inspection report

Task progress [Printable view](#)

From date* 29/06/2006 To* 29/06/2006 All Houses All Staff All Status Go

Job name	House	Due date	Assigned to	Status
infotrove	Monkey cage	29/06/2006	emma louise toohill	Not Started
Hard Copy Filing	Monkey cage	29/06/2006	emma louise toohill	Not Started
General Administration	Monkey cage	29/06/2006	emma louise toohill	Not Started
Daily banking	Gorilla Cage	29/06/2006	Michelle Monkey	Not Started

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Updating Reward Task Inspections

After performing a reward tasks inspection, the results must be entered in the system. The House Dynamic Rating is entered on the same screen.

The House Dynamic Rating is your rating of the house vibe etcetera when you visited it for the inspection and should be completed after every cleaning inspection. It is a measure of how well you are received by the stayers. Generally, a happy, well-adjusted property with a positive attitude and dynamic will be friendly and respectful towards your role in helping them build a good community. If their attitude is not like this, you should work towards getting it there and record your progress as you go. 100% is the highest possible rating.

Note: The system will not allow you to enter the results of inspections until after they are due.

To enter reward inspection results:

1. Click **Task Manager**.
2. Click **Reward task inspection**.
3. Filter by house (optional).
4. The results of the last inspection are indicated with a box around the rating. In the the above example, it was excellent. (See below for an explanation of the rating codes.)

Task name	Location	Agg. rating			Max. point	Inspection rating				
		HC	S	M		P	VA	A	G	E
Clean out fridge	Monkey cage, Kitchen	0.0	0.0	20.0	20.0					E

5. Enter your comments regarding the inspection. If you're giving the job a low rating, make sure you explain why.
6. Select a rating.
7. Select a House Dynamic Rating and enter any worthwhile comments.
8. Click **Save** when finished.

Comments: Rotten milk left in fridge

Clean ovens each week Monkey cage, Kitchen 0.0 0.0 20.0 20.0

Comments: Great job - best yet

HC - House Captain, S - staff, M - Management

House Dynamic Rating

Overall home rating 10 20 30 40 50 60 70 80 90 100

Comments: The house is very buzzy. If it wasn't for Fred grunting at me when I pointed out the rotten milk in the fridge, I would have rate it higher.

Save Cancel

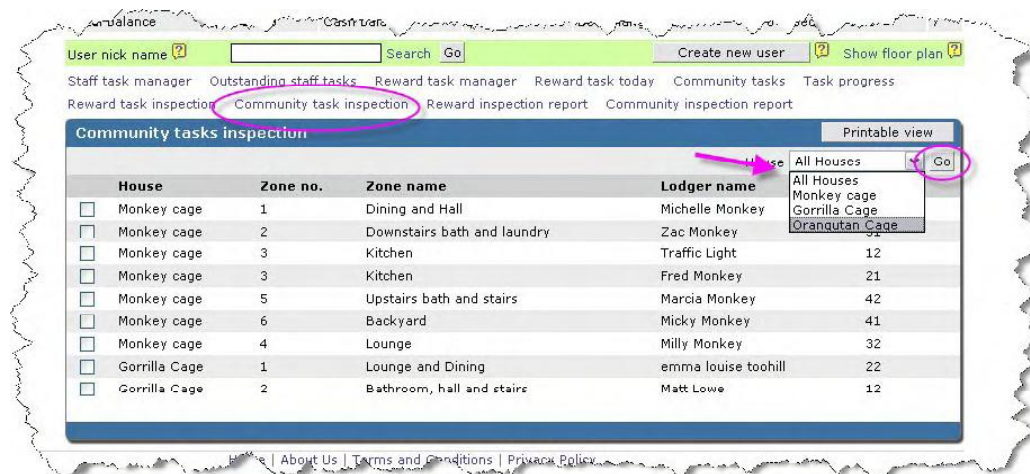
Fining and Warning Stayers after Community Task Inspections

After completing a community task inspection, use this procedure to fine or send warnings to stayers for non-compliance.

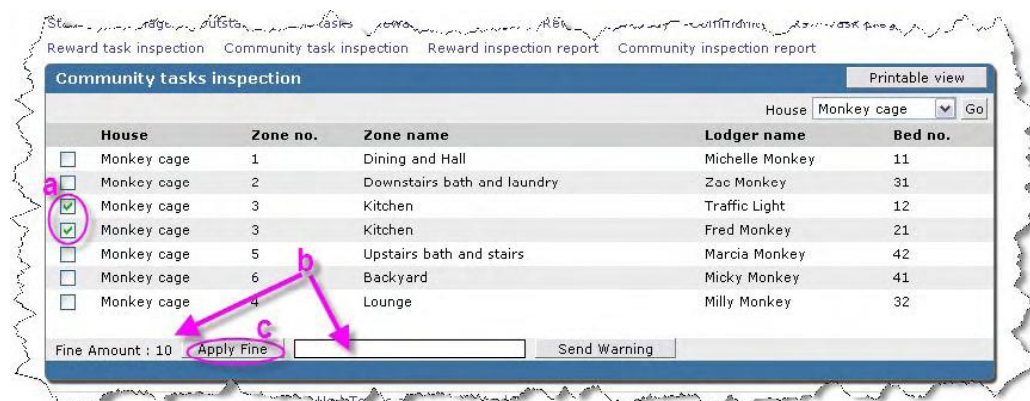
Note: If stayers pass the inspection, you don't need to do anything.

To fine or warn stayers:

1. Click **Task manger**.
2. Click **Community task inspection**.
3. Select the house.
4. Click **Go**.



5. To fine stayers:
 - a. Select the stayers to be fined.
 - b. The default amount of the fine is shown. If you want to alter the amount, enter it in the box.
 - c. Click Apply fine.



7. To send a warning to a stayer:
 - a. Select the stayer that you want to warn.
 - b. Click **Send warning**.

User nick name Search Create new user

Staff task manager Outstanding staff tasks Reward task manager Reward task today Community tasks Task progress

Reward task inspection Community task inspection Reward inspection report Community inspection report

Community tasks inspection

House

House	Zone no.	Zone name	Lodger name	Bed no.
<input checked="" type="checkbox"/> Gorrilla Cage	1	Lounge and Dining	emma louise toohill	22
<input type="checkbox"/> Gorrilla Cage	2	Bathroom, hall and stairs	Matt Lowe	12

Fine Amount : 10

Running Inspection Reports

There are reports that show the results past and community and reward task inspections.

To run the reward task report:

1. Click **Task manager**.
2. Click **Reward task report**.
3. Use the filters.
4. Click **Go**.

Manage Staff Tasks Outstanding staff tasks Reward tasks **Unclaimed reward tasks** Community tasks Task progress

Reward task inspection Community task inspection **Reward task report** Community task report

Reward task report

From* To* House

Owner Staff

Task Name	Date	Owner	Inspected Date	Max Pts.	Points	Inspected By
No inspection/scores found.						

5. The results of inspections for the criteria selected are shown.

Reward task Community task inspection Reward task report Community task report

Reward task report

From* To* House

Owner Staff

Task Name	Date	Owner	Inspected Date	Max Pts.	Points	Inspected By
Clean out fridge	11/10/2006	Fred Monkey	11/10/2006	20	10	chris virtue
Clean ovens each week	11/10/2006	Traffic Light	11/10/2006	20	20	chris virtue

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To run the community inspection report:

1. Click **Task manager**.
2. Click **Community inspection report**.
3. Select the date, the house and click **Go**.

The screenshot shows the 'Community inspection report' form. At the top, there is a navigation bar with links: 'Staff task manager', 'Outstanding staff tasks', 'Reward task manager', 'Reward task today', 'Community tasks', and 'Task progress'. Below this is a sub-navigation bar with 'Reward task inspection', 'Community task inspection', 'Reward inspection report', and 'Community inspection report' (highlighted with a pink oval). The main form has a header 'Community inspection report' and a 'Printable view' link. It contains fields for 'Inspection Date' (set to 29/06/2006, highlighted with a pink oval), 'House' (set to 'All Houses', highlighted with a pink oval), and a 'Go' button (highlighted with a pink oval). Below these fields is a table with columns 'House Name', 'Lodger Name', and 'Rating'. The table currently shows 'No details found'. Three pink arrows point from the 'Inspection Date', 'House', and 'Go' fields to the table area.

4. The results are shown:

The screenshot shows the 'Community inspection report' results table. The table has columns 'House Name', 'Lodger Name', and 'Rating'. The results are as follows:

House Name	Lodger Name	Rating
Monkey cage	Michelle Monkey	Warning
Monkey cage	Michelle Monkey	Warning
Monkey cage	Zac Monkey	Warning
Monkey cage	Zac Monkey	Warning
Monkey cage	Milly Monkey	Warning
Monkey cage	Marcia Monkey	Warning
Monkey cage	Micky Monkey	Warning
Monkey cage	Micky Monkey	Warning
Monkey cage	Fred Monkey	Fined
Monkey cage	Marcia Monkey	Warning
Monkey cage	Milly Monkey	Warning
Monkey cage	Traffic Light	Fined
Gorilla Cage	emma louise toohill	Warning
Orangutan Cage	Ziggy Monkey	Success
Orangutan Cage	Iva Monkey	Success
Orangutan Cage	James Ostererg Monkey	Success

Managing Stayers

SWTE Pro's Extra Functionality for Managing Stayers

In this section, we're not going to go over the functions that you've already been using. Refer to your SWTE Start guide for information on:

- Creating a New Stayer Account
- Finding an Existing Stayer's Account
- Booking a Stayer into a Bed
- Cancelling a Booking
- Accepting Rent Payments
- Departing Stayers
- Checking Stayers Out

Proactive Stayer Management

Once a prospect has paid their deposit for a bed in your place, they become a stayer and are placed on your arrivals list. In this chapter, we show you how to manage your stayers from their arrival, rent payments and bed changes through to their departure. All this happens in the *Manage Stayers* pages.

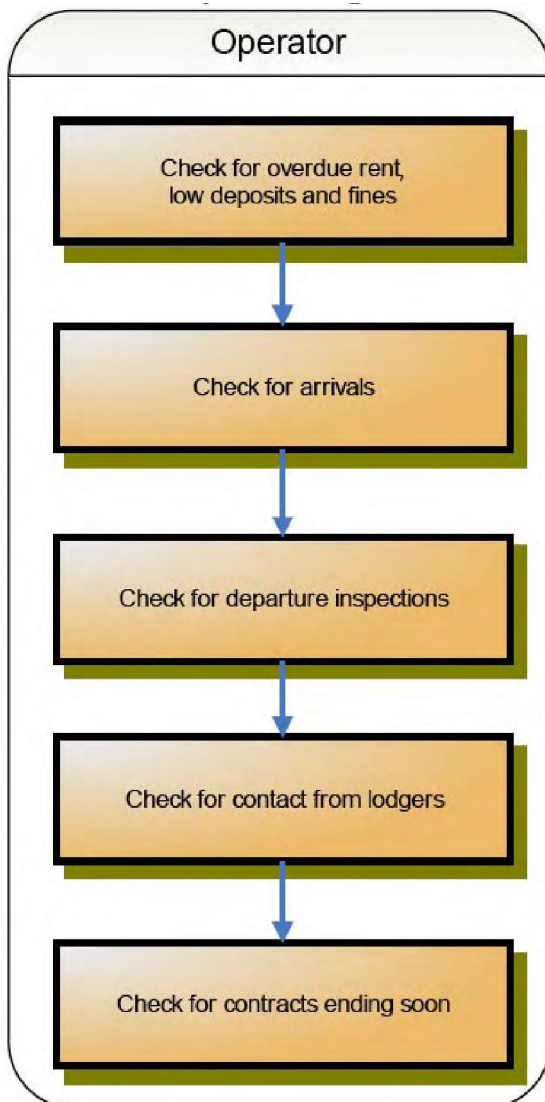
There are basically two approaches for managing your stayers. One is to deal with stayers individually and as you need to, like when they come to the office. The other is to be proactive by anticipating what you need to do in managing them collectively.

To deal with stayers individually, it's simply a matter of locating their account in the system and everything you need is there.

However, dealing with stayers proactively is an approach you should take. It means that you'll know when:

- stayers are late with their rent
- stayers are arriving so that you're ready for them
- stayers are leaving so that you're ready for inspections
- beds are going to be free so that you can sell them

Proactive Stayer Management Workflow



Start your day looking at:

1. who's late with rent
2. security deposits that have dropped to a risk level
3. who owes you money in fines.

After you've done that, check to see who's arriving over the next few days so that you can make sure that someone is going to be there to welcome them. If you have on-line agreements and new stayers haven't completed them, you might like to chase them up because it makes it quicker when they arrive.

Next, you need to see who's leaving in the next week so that someone will be there to do the inspections.

Then, check to see if any stayers have contacted you through the system with any issues or requests.

It's a good idea to have a look at what contracts are ending within the next week (or whatever your notice period is) so that you can either get them to renew their contract or give notice, because once they give notice, you can get on with selling the bed.

Individual Stayer Management

You can always access a stayer's account (from the green bar or by click on their name) and deal with them individually.

Among the things that you can do for stayers in SWTE Pro are:

- resetting their password
- collecting rent, top up their deposit and collect fines
- loan items (if you offer the facility)
- manage their contract
- swaps beds without them having to put in a request
- give notice
- check them out
- view transactions and reports on their account during their stay
- sell items under the reward program (if you have one)
- make rent adjustments
- convert cash and rewards
- view how they answered the compatibility quiz
- view their contract history

Account details

First name: Fred, Last name: Monkey

Account type: Working Traveller

Permanent address:

Most of these stayers can do for themselves. If you want to find out more about all this functionality, click each of the links and click the help icon. ?

Currents Tenants List

The Current Tenants List report shows who's in your houses at the moment, the contract they're on and when it's due to end. You can also access stayer accounts from here.

Current tenants list

Stayer Name	House	Bed	Period	Nationality
Michelle Monkey	Monkey cage	11	17/05/2006 - 18/10/2006	australia
Fred Monkey	Monkey cage	21	21/06/2006 - 15/10/2006	
Zac Monkey	Monkey cage	31	19/05/2006 - 13/10/2006	USA
Milly Monkey	Monkey cage	32	30/05/2006 - 12/10/2006	australia

Adjusting beds

Use this to move a stayer from bed to another without the stayer having to raise a request. You would use this if you find that people have been sleeping in the wrong beds because it's often easier to update the system than to move the people involved.



The screenshot shows the 'Adjust beds' form in the SWTE system. At the top, there is a navigation bar with links: 'User nick name', 'Search', 'Go', 'Create new user', and 'Show floor plan'. Below this is a menu bar with various options: 'Adjust beds', 'Arrivals today', 'Bed modification report', 'Current tenants list', 'Compatibility statistics', 'Complaint log', 'Contracts ending', 'Messages to management', 'Nominations', 'Nomination Approvals', 'Pending Inspections', and 'Request log'. The 'Adjust beds' form itself has a title bar 'Adjust beds' and a 'Go' button. The form fields are: 'Date of request' (02/06/2006), 'From Lodger' (Monkey cage, Milly Monkey, Bed No. 32), and 'To Bed' (Monkey cage, Bed No. 42, Available on 02/03/2006). There is an 'Adjust beds' button at the bottom of the form. At the very bottom of the page, there is a footer with links: 'Home', 'About Us', 'Terms and Conditions', and 'Privacy Policy'.

Dealing with Arrivals

You have probably been using the arrivals function since you started using SWTE. We include it here again because SWTE Pro has on-line stayer agreements and community cleaning.

If you have on-line agreements (or pre-check ins), dealing with a stayer's arrival is much easier if it is completed before they turn up, as they will know how you run your place.

To check-in a stayer:

1. Click **Manage Stayers**.
2. Click **Arrivals today**.



The screenshot shows the 'Arrivals today' screen in the SWTE system. At the top, there is a navigation bar with links: 'User nick name', 'Search', 'Go', 'Create new user', and 'Show floor plan'. Below this is a menu bar with various options: 'Current tenants list', 'Adjust beds', 'Arrivals today', 'Bed modifications', 'Compatibility statistics', 'Complaint log', 'Contracts ending', 'Stayer Queries', 'Nominate a stayer', 'Process Nominations', 'Pending Departures', and 'Request log'. The 'Arrivals today' screen has a title bar 'Arrivals today' and a 'Go' button. It features a date range selector: 'From Date' (11/10/2006) and 'To' (18/10/2006). Below this is a table with the following columns: 'Name', 'Stayer Id', 'Home', 'Bed', 'Booked date', 'Arrival date', and 'Check In'. The table contains one row: 'Johnette Monkey', '2025', 'Orangutan Cage', '24', '11/10/2006', '11/10/2006', and 'Check In'. At the bottom of the page, there is a footer with links: 'Home', 'About Us', 'Terms and Conditions', and 'Privacy Policy'.

If the arrival has Check In Procedure next to it, then the stayer has not completed the pre-check-in. Sit them down at the computer, get them to log in and do it. If it has Check In, the system is ready to accept the new stayer.

3. Click **Check In**.
4. If you have community tasks, then on the Check In screen, select a zone for them to maintain.

5. Click **Check In**.

SWTE's most wanted

Arrive stayers

Stayer Id	2025
Name	Johnette Monkey
House/Bed No.	Orangutan Cage, Bed No. 24
Date of booking	11/10/2006
Arrival date	11/10/2006
Contract end date	10/12/2006
Area	4 Dining and hall

5

Current area details

Area name (Show floor plan)	No. of Stayer responsible	Recommended no of lodgers to maintain the zone
Dining and hall	0	2
Downstairs bath and laundry	0	1
Kitchen	1	2
Upstairs bath & stairs	0	1
Backyard	0	2
Lounge	0	1

6. That's it. Hand them the keys, show them to their room.

Bed modification report

SWTE's most wanted

Current tenants list Adjust beds Arrivals today **Bed modifications** Compatibility statistics Complaint log

Contracts ending Stayer Queries Nominate a stayer Process Nominations Pending Departures Request log

SWTE's most wanted

Bed modifications

From Date* 11/06/2006 11/2 To Date* 11/10/2006 11/2 House All Houses

Users All Users Type All Types Go

Mod. Date	House	Bed No	Stayer	Type	Modification	By
13/06/2006	Monkey cage	11	Michelle Monkey	Departure	Set departure notice for 27/06/2006	chrisv
13/06/2006	Monkey cage	11	Michelle Monkey	Contract Management	Pre closed the contract from 31/07/2006 to 27/06/2006. Contract rate changed to \$ 150.00 / chrisv \$ 21.43	
13/06/2006	Monkey cage	11	Michelle Monkey	Departure	Set departure notice for 27/06/2006	chrisv
13/06/2006	Monkey cage	11	Michelle Monkey	Departure	Revoke departure notice	chrisv
13/06/2006	Monkey cage	11	Michelle Monkey	Departure	Set departure notice for 04/07/2006	chrisv
13/06/2006	Monkey cage	11	Michelle Monkey	Contract	Extended contract from 27/06/2006 to 10/12/2006. Contract rate changed to \$ 150.00 / \$ 21.43	chrisv

Run this report to show all the transactions on your beds for the selected period.

Viewing Compatibility Statistics

This report gives you statistics from the electronic survey stayers completed before they moved in. They were asked for their preferences in the context of a shared living environment.

You can filter by house or see the results averaged across all your houses.

User nick name Search Create new user

Current tenants list Adjust beds Arrivals today Bed modifications **Compatibility statistics** Complaint log

Contracts ending Stayer Queries Nominate a stayer Process Nominations Pending Departures Request log

SWTE's most wanted

Compatibility statistics

Select House : All houses

1 You would like to find a place to stay where lodgers emphasize

A Communal spirited shared living atmosphere where those you share with become a second family	35.29 %
People share house but keep to themselves in their private lives	0.00 %
Complete privacy where everyone keeps to themselves	0.00 %

2 You would prefer the property you live in to be

Kept clean daily by those living in it, just chipping in as and when they can	29.41 %
Cleaned once weekly by the whole house doing a weekly house clean at the same time	0.00 %
Kept clean by each occupant being held accountable for cleaning a different communal living area	0.00 %
Occupants paying extra rent to cover a house cleaner to come in and clean week to week	5.88 %

3 Your preferred shared living management structure would be

Professionally managed by a 3rd party managing agent from a separate office	29.41 %
Managed by an independant landlord who owns and manages the property on site	5.88 %
Managed by a head tenant who lives on site and manages their co occupants directly	0.00 %

Checking for Contracts Ending

When stayers are about to come out of contract, it is a good idea to get them to renew or to give notice, because if they're going to leave, you will want to start selling that bed as soon as possible.

Note (1): If stayers don't renew their contract when it ends, the system will automatically move them onto the variable rate. The system will assume that they are staying and charge them weekly until the stayer gives departure notice. The contract endings report provides data on how many people are coming off contract.

Note (2): Departure notice is required for stayers intending to leave at the end of their contract.

To check for contracts ending:

1. Click **Contracts ending**.

User nick name Search Create new user

Current tenants list Adjust beds Arrivals today Bed modifications Compatibility statistics **Contracts ending** Complaint log

Stayer Queries Nominate a stayer Process Nominations Pending Departures Request log

SWTE's most wanted

Contracts ending

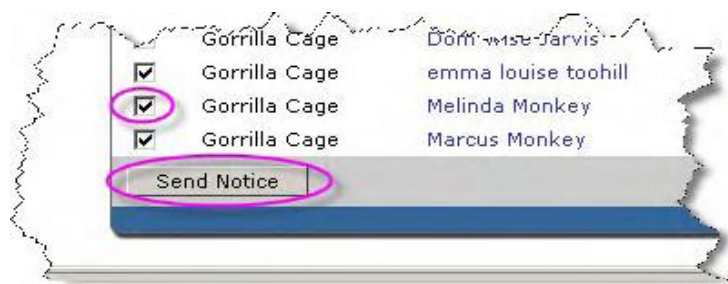
House All Houses 7 days

	Home	Stayer Name	Bed	Contract Ending	Departure Notice due
<input type="checkbox"/>	Monkey cage	Michelle Monkey	11	18/10/2006	11/10/2006
<input type="checkbox"/>	Monkey cage	Fred Monkey	21	15/10/2006	08/10/2006
<input type="checkbox"/>	Monkey cage	Zac Monkey	31	13/10/2006	06/10/2006
<input type="checkbox"/>	Monkey cage	Milly Monkey	32	12/10/2006	05/10/2006
<input type="checkbox"/>	Monkey cage	Micky Monkey	41	12/10/2006	05/10/2006
<input type="checkbox"/>	Monkey cage	Traffic Light	42	16/10/2006	09/10/2006
<input type="checkbox"/>	Gorilla Cage	Dom Wise Jarvis	11	13/10/2006	06/10/2006
<input type="checkbox"/>	Gorilla Cage	emma louise toothill	22	16/10/2006	09/10/2006
<input type="checkbox"/>	Gorilla Cage	Melinda Monkey	31	12/10/2006	05/10/2006
<input type="checkbox"/>	Gorilla Cage	Marcus Monkey	32	18/10/2006	11/10/2006

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A list of stayers that are about to come out of contract is shown.

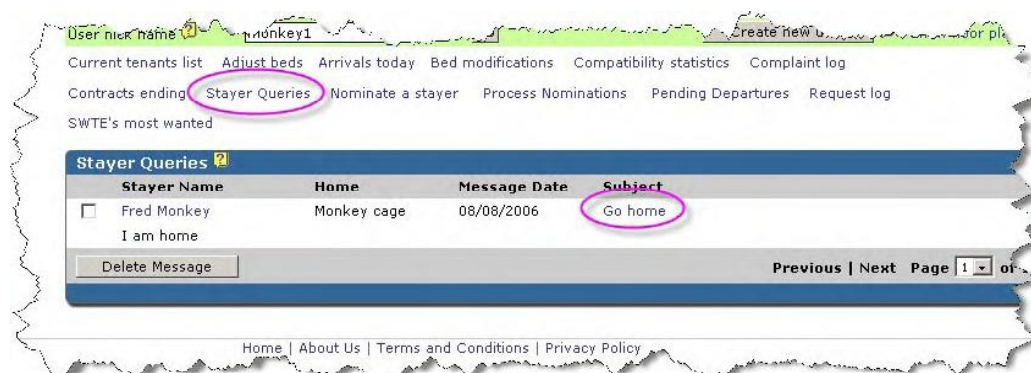
2. To send a notice reminding them that they are about to come out of contract, click the box next to the stayers and then click **Send Notice**.



Stayer Queries and Complaints

If you allow your stayers to respond to automated query templates, their messages are listed here.

If you want to respond further, click the message subject.



After you or your staff have responded to the queries, they are removed from the list.

If your staff are dealing with stayer queries, you can monitor the messages under the complaint log.



Nominating Stayers for Rewards or Penalties

Your staff or other stayers can nominate stayers for rewards or penalties if they do something either really good and helpful or the opposite. All nominations must be approved by management.

The screenshot shows the 'Nominate a stayer' form. At the top, there is a navigation bar with links: 'Current tenants list', 'Adjust beds', 'Arrivals today', 'Bed modifications', 'Compatibility statistics', 'Complaint log', 'Contracts ending', 'Stayer Queries', 'Nominate a stayer' (highlighted with a pink circle), 'Process Nominations', 'Pending Departures', and 'Request log'. Below the navigation bar, the form title is 'Nominate a stayer'. The form contains the following fields:

- Select a house:** Monkey cage
- Select a zone:** Bedroom 3
- Recipients:** ☒ Milly Monkey ☐ Zac Monkey
- Nomination type*:** Reward
- Reason*:** For being very helpful and welcoming to Bob when he arrived. It was good of you to show him the ropes
- Approval points*:** 010

A 'Submit' button is located at the bottom of the form.

Complete all the fields. If you want to nominate the entire house, select All zones.

This image shows a close-up of the 'Select a zone' dropdown menu. The menu is open, showing the following options: 'All zones', 'Bedroom 1', 'Bedroom 3', 'Bedroom 4', 'All zones' (highlighted), and 'Bedroom 2'.

Processing Nominations

You can approve and reject those nominations here.

All nominations pending your approval are listed. Click **Pending** to bring up the approval screen where you can either approve or decline the nomination.

The screenshot shows the 'Process Nominations' table. At the top, there is a navigation bar with links: 'Current tenants list', 'Adjust beds', 'Arrivals today', 'Bed modifications', 'Compatibility statistics', 'Complaint log', 'Contracts ending', 'Stayer Queries', 'Nominate a stayer', 'Process Nominations' (highlighted with a pink circle), 'Pending Departures', and 'Request log'. Below the navigation bar, the table title is 'Process Nominations'. The table has the following columns: 'Date', 'Name', 'Nominated by', 'Type', 'Points', 'Reason', and 'Status'. The table contains one row of data:

Date	Name	Nominated by	Type	Points	Reason	Status
12/10/2006	Zac Monkey	monkey1	Penalty		He's a pig. He left a bowl of spaghetti bog on the couch and I didn't see it in the fark and I sat on it. He just laughed. I hate him!	Pending

At the bottom of the table, there are links for 'Previous month's transactions' and 'Next month's transactions'. A 'Filter by' dropdown menu is located at the top right of the table, set to 'Pending'.

Request log

The request log is a record of the requests that have been approved and declined. You can filter by house, type of request and a date range.

Request log

Printable view

From* 12/01/2006 To* 12/10/2006 House All Houses Type All Types Go

Type	Date	Requested by	House	Decision	Date	Processed by
Maintenance toilet leaking	24/03/2006	Johnette Monkey	Monkey cage	Approved	24/03/2006	chris virtue
Cash Wages	28/03/2006	chris virtue	Monkey cage	Issued	29/03/2006	chris virtue
Maintenance Television on the blink	28/03/2006	Johnette Monkey	Monkey cage	Approved	28/03/2006	chris virtue
Maintenance toaster not working	29/03/2006	chris virtue	Monkey cage	Approved	29/03/2006	chris virtue

Inventory

In this section, we show you how to use the SWTE Pro's asset and inventory manager to effectively manage your stock, fixed assets and fixtures.

Inventory falls roughly into three categories:

- stock – day to day consumables (e.g. toilet paper, cleaning aids etc)
- fixed assets – furniture and portable appliances such as TVs
- fixtures and fittings – items that are part of the house (e.g. light fittings, major built-in appliances such as stoves and ovens)

The easiest way to think of the difference between a fixed asset and a fixture is that if you take it with you when you sell the house, it's a fixed asset. If you leave it behind, it's a fixture.

The system allows you to record vital information about the items in your houses. For instance, you will have light fittings all over the house, some might be incandescent, others may be flouros. Let's say that the light on the back porch isn't working. Because you've recorded all the details of the light in the system, you can tell the electrician what type of light it is, the correct wattage and whether a ladder is needed or not.

We'll start with registering suppliers and contractors because they need to be in the system before you can link stock to suppliers and other items to contractors for repairs.

Registering Suppliers

To register a supplier in the system:

1. Click **Inventory**.
2. Click **Suppliers**.
3. Click **Add New Supplier**.



- Complete all fields on the Suppliers page as required. Click **Finished** when done.

Suppliers

Supplier Name* Jimmy's Cleaning Products

Address* 1/45 Purple St

City Hazeville

State NSW

Country Australia

Postcode 2986

Contact Name James Osertberg

Telephone 1969 1970 Fax 1969 1970

Email jamesosterberg@jimmyscleaning.com.au

Trade Categories*

- Appliances
- Building
- Cleaning
- Electrical
- Hire Equipment
- Indoor Furniture
- Kitchen Ware
- Locks

 (Press Ctrl + Click to select more than 1)

Notes Usually delivers with 48 hours

Save Cancel

- The newly added supplier is shown.

Suppliers

Trade category All trade categories

Name	Location	Telephone	
<input type="checkbox"/> Jimmy's Cleaning Products	1/45 Purple St	1969 1970	Edit
Trade categories : Cleaning			
<input type="checkbox"/> Eco Green	Queensland	92118878	Edit
Trade categories : Cleaning			

Delete Checked Supplier Add New Supplier

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Registering Contractors

To register a contractor:

- Click **Inventory**.
- Click **Contractors**.
- Click **Add New Contractor**.

Contractors

Search nature of business

Contractor Name	Address	Telephone	
<input type="checkbox"/> Daves Plumbing	Queensland	07 92111663	Edit
Nature of business : All plumbing Jobs over \$200 must be...			
<input type="checkbox"/> Danny Boy's Plumbing	PO 123	-	Edit
Nature of business : Plumbing			

Delete Checked Contractor Add New Contractor

Previous | Next Page 1 of 1

4. Complete the fields as required on the Contractors screen. Click **Save** when finished.

Contractors

Contractor name* Re-Volting Electrics

Contact person* Frank Zapper

Address* PO Box 354

City Cretinberry

State NSW

Country Australia

Postcode 2193

Phone 9573 0301

Fax 9573 0333

Email frank@revolting.com.au

Nature of business* Electricians

Save Save and Add Cancel

5. The newly added contractor is shown.

<input type="checkbox"/>	Danny Boy's Plumbing	PO 123	Edit
	Nature of business : Plumbing		
<input type="checkbox"/>	Re-Volting Electrics	PO Box 354	9573 0301 Edit
	Nature of business : Electricians		
Delete Checked Contractor		Add New Contractor	Previous Next Page 1 of 1

Managing Stock

Use inventory to manage your consumables. You can:

- add stock
- enter new stock items
- issue stock to your houses
- view the usage of stock

To add a new item to your inventory:

1. Click **Inventory**.
2. Click **Stock**.
3. Click **Add New Item**.



4. Complete the fields as required on the Stock screen. Remember to put in the quantity on hand. If you have more items to add after this one, then click **Save and Add**. Click **Save** if this is the last item.



To add stock to inventory:

1. Click **Inventory**.
2. Click **Stock**.
3. Enter the quantity acquired in the Quantity at hand field for the item then click **Add stock**.

The screenshot shows the 'Stock' management page. At the top, there's a search bar with 'User nick name' and a 'Search' button. Below it are tabs for 'Stock', 'Fixed assets', 'Fixtures & fittings', 'Suppliers', and 'Contractors'. The 'Stock' tab is active, displaying a table with columns: Item name, Make / Brand, Quantity at hand, Purchase date, Supplier, and View. The table lists four items: '1 ltr Bleach Bottle' (Eco Green, 5), 'Chlorine - 5kg' (Chlorogoolie, 3), 'Floor polish - 1 lt' (Old Scrubber, 2), and 'Gorilla BBq Cleaner 1...' (Gorilla, 5). The 'Quantity at hand' column has input fields next to each item. The 'Add stock' button is highlighted with a red circle at the bottom of the table. Below the table are buttons for 'Select house to issue to', 'Issue items', 'Add stock', 'Add New Item', 'Previous', 'Next', and 'Page 1 of 1'.

4. Inventory updates with the new stock levels.

This screenshot shows the same 'Stock' management page as before, but the 'Quantity at hand' values have been updated. The '1 ltr Bleach Bottle' now shows '10 +/-', 'Chlorine - 5kg' shows '4 +/-', 'Floor polish - 1 lt' shows '2 +/-', and 'Gorilla BBq Cleaner 1...' shows '5 +/-'. The 'Add stock' button remains highlighted.

To issue items to houses:

1. Click **Inventory**.
2. Click **Stock**.
3. Enter the quantity to be issued in the Quantity at hand field for the item.
4. Select the house to issue the stock to.
5. Click **Issue items**.

The screenshot shows the 'Stock' management page with the 'Quantity at hand' values updated to '10 +/-', '4 +/-', '2 +/-', and '5 +/-'. The 'Issue items' button is highlighted with a red circle. A red arrow points to the 'Orangutan Cage' dropdown menu, which is selected in the 'Select house to issue to' field. The 'Add stock' button is also visible.

6. Inventory updates with the new stock levels.

User nick name Search Create new user Show floor plan

Stock Fixed assets Fixtures & fittings Suppliers Contractors

Item name	Make / Brand	Quantity at hand	Purchase date	Supplier	View
1 ltr Bleach Bottle	Eco Green	10 +/- <input type="text"/>	15/04/2006	Eco Green	View usage
Chlorine - 5kg	Chlorogoolie	3 +/- <input type="text"/>	16/05/2006	Pratt's Pool Shop	View usage
Floor polish - 1 lt	Old Scrubber	2 +/- <input type="text"/>	01/05/2006	Jimmy's Cleaning Products	View usage
Gorilla BBq Cleaner 1...	Gorilla	5 +/- <input type="text"/>	15/04/2006	Eco Green	View usage

Orangutan Cage Previous | Next Page 1 of 1

Registering Fixed Assets

As we said earlier, fixed assets are major appliances that are not part of the house (e.g. fridge, free standing barbecue). If it's part of the house (e.g. stove, oven etc) it's a fixture.

Note: If a major appliance ever needs a service call, the information entered here can be sent to the repairer, so make sure you put in as much relevant information as possible.

To record a fixed asset in inventory:

1. Click **Inventory**.
2. Click **Fixed assets**.
3. Click **Add New Item**.

User nick

Stock Fixed assets **Fixtures & fittings** Suppliers Contractors

Fixed assets

Select a house zone category

Item name	Make	Model	Location	Loaned by
No item found.				

4. Complete the fields on the Fixed assets screen.
 - a. Put in enough information for a repairer.
 - b. Only complete the Renting options part if you intend to lend the item to your stayers.
 - c. Don't forget the item's location.
 - d. Click **Save** when finished.

5. The item is added

Registering Fixtures and Fittings

Fixtures and fittings are different to fixed assets in that they are part of the house. It includes taps, light fittings, doors, windows toilets, baths and more. If a barbecue is built-in (i.e. it can't be picked and moved) it's a fixture. If it's on wheels and can be taken with you when you leave, it's an asset.

How much you put in here is up to you. However, it is useful to record things that need regular repairs or replacement parts, such as lights. You can record the type of light, the wattage and so on, so that if you need an electrician, you can pass the information recorded straight on. That way they don't bring a flouro when the fitting is a floodlight. It is also a good idea to put extra information, too, such as whether a ladder is required.

To record fixtures and fittings:

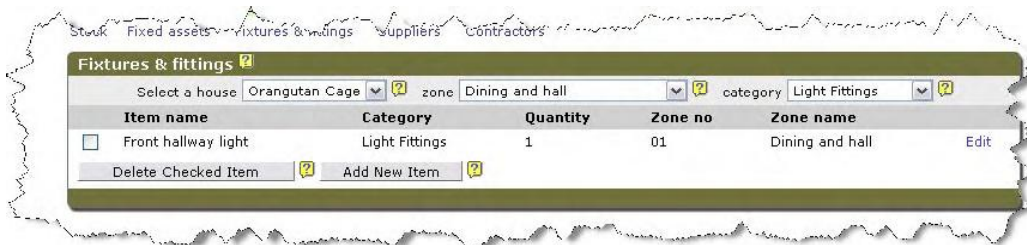
1. Click **Inventory**.
2. Click **Fixtures & fittings**.
3. Click **Add New Item**.



4. Complete the fields on the Fixed & fittings screen.
 - a. Don't forget the item's location.
 - b. Put in enough information for a repairer in the notes field.
 - c. Click **Save** when finished.



5. The item is added



SWTE Rewards

Introduction

Stayers

Stayers can earn reward points for performing both community tasks and reward tasks.

By completing community tasks, stayers earn standard reward points that can be spent within the SWTE rewards program to “buy” items offered by reward partners.

By completing reward tasks, stayers earn cash back points that can be used to pay rent at an exchange rate of \$1 for each point earned. Stayers can also, if they want, convert their cash backs into standard reward points at a rate of \$1.50 per point.

Reward Partners

Of course, before stayers can “spend” their reward points, there needs to be some reward partners. You can invite local businesses to become partners: it’s the only way they can get on the program. It provides them with an excellent way to increase business. They can increase customer loyalty from the stayers living within their local or national accommodation providers’ properties.

Reward Partners can easily manage their offers via the SWTE web interface and only they can add offers.

Adding a Reward Partner

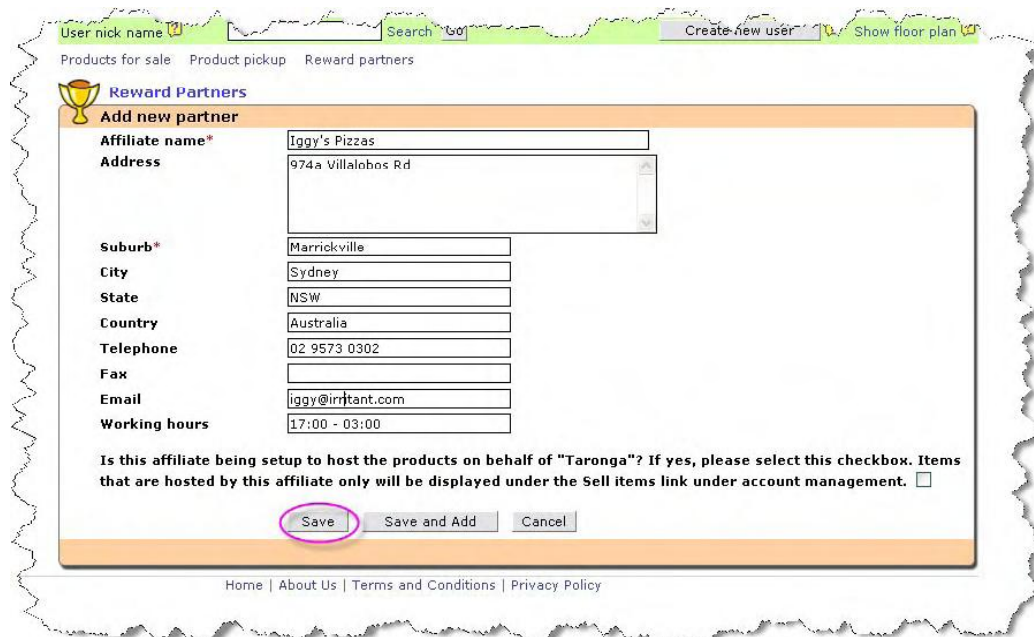
Before you can dish out the rewards, you need to have some partners. After adding a partner, you then need to add their staff to operate the program.

To add a reward partner:

1. Click **Reward Programs**.
2. Click **Reward partners**.
3. Click **Add New Reward Partner**.



4. Enter the new partner's details as required and click **Save** when finished. If you have more partners to add, click **Save and Add**.



5. The newly added reward partner displays.

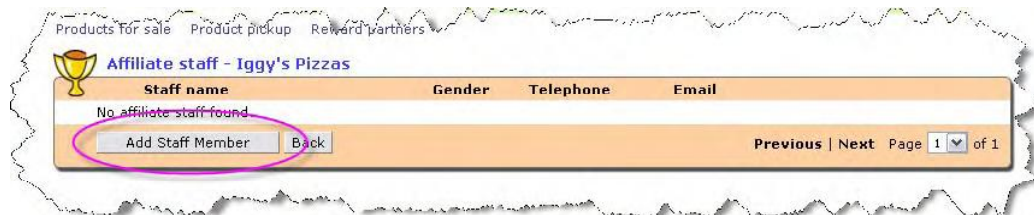


To add staff to a partner:

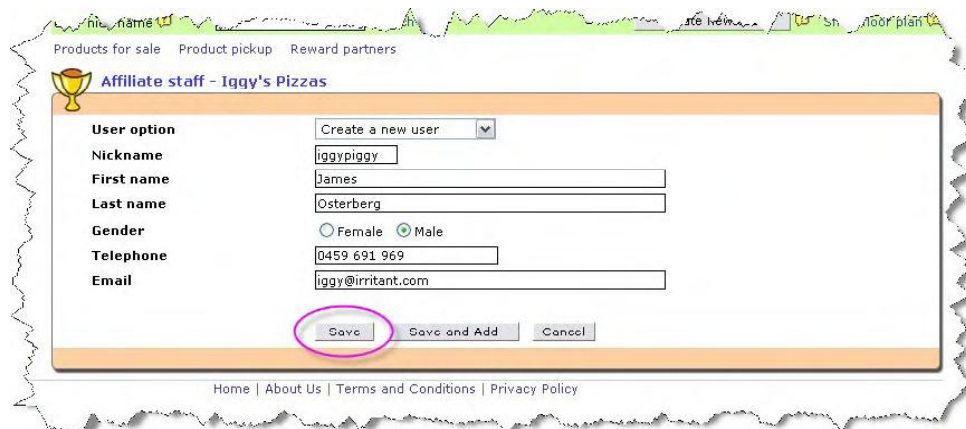
1. Click **Staff members** next to the partner.



2. Click **Add Staff Member**.



3. All partner staff need to have SWTE user accounts.
 - a. If you need to create a new user account for this staff member, select Create a new user and enter their details as required.



- b. If the staff member already has a SWTE account, enter their user name and click **Search**.



4. The new staff member displays:

The screenshot shows a web application interface for managing affiliate staff. At the top, there is a search bar with the text 'user nick name' and buttons for 'Search' and 'Go'. To the right, there are links for 'Create new user' and 'show floor plan'. Below this, there are links for 'Products for sale', 'Product pickup', and 'Reward partners'. The main section is titled 'Affiliate staff - Iggy's Pizzas' and features a trophy icon. It contains a table with the following data:

Staff name	Gender	Telephone	Email
<input type="checkbox"/> James Osterberg	Male	0459 691 969	iqqy@irritant.com

Below the table, there are three buttons: 'Delete Staff Member', 'Add Staff Member', and 'Back'. At the bottom right, there are links for 'Previous' and 'Next', and a pagination indicator showing 'Page 1 of 1'.

Settings

We've already had a look at the settings at the start of this document. We won't go into it again, other than to say that the best way to learn about the settings is to look for yourself. There's help everywhere.

For more information, refer to Editing Settings under the Configuring Your System section.

Sales

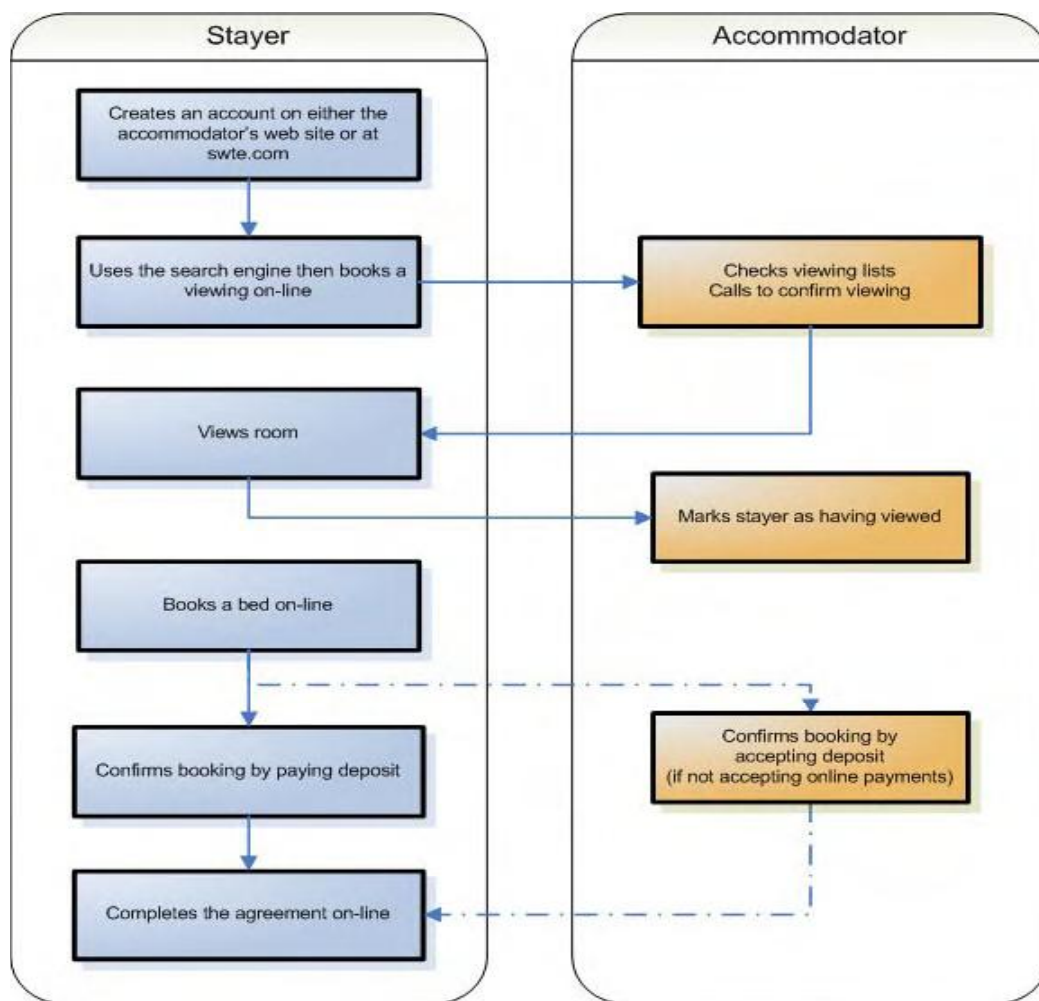
Sales is all about getting people into your properties. This section takes you through the sales process from when a prospect creates an account with you to booking a viewing, then hopefully paying their deposit securing your room right through to checking them in.

It covers two scenarios:

- stayer self-management: stayer create a new account or have an existing account created through the accommodator's web site or swte.com web site, and find an accommodator's house in the search engine then books to view it or books to secure it.
- accommodator-driven sales: accommodator takes an enquiry over the phone and creates the stayer account and books the bed for the stayer

Stayer Self-Management

The following flowchart provides an overview of the sales process where the stayer has an account and uses the search engine to find a home.



Checking for Viewings

Note: If stayers do not have to view your house before booking a bed, this step is optional.

To check the viewing list:

1. Click **Sales**.
2. Click **Viewing List**.

User nick name: [] Search: [] Create new user: [] Show floor plan: []

Sales Register New Accounts **Viewing list** Viewed homes Bed status Waiting List Conversions Occupancy

Viewing list

Select house: All House

From Date 13/10/2006 To Date 13/10/2006 Go

Visitor Name	Telephone	e-Mail	Houses	Viewing Date	SWTE Score
<input type="checkbox"/> Fred Monkey	1234567890	cvlists@inhouse.com.au	Monkey cage, Gorilla Cage, Orangutan Cage	13/10/2006	5.8

Remarks: [] Reschedule for: []

Save Comments Mark as viewed Reschedule Delete

The list of people who want to view your home is displayed along with their contact details.

Marking Off as Viewed

Note: If stayers do not have to view your house before booking a bed, this step is optional.

After prospective stayers have viewed your home and you'd like them to move in, mark them off as viewed. It is important to do this straight away because they can't book a room until you have done this.

To mark as viewed:

1. Bring up the viewing list (see *Checking for Viewings*).
2. Add useful comments about the stayers:
 - a. Make sure the box next to the stayer is checked.
 - b. Type your comment.
 - c. Click **Save Comments**.
3. Mark as viewed
 - a. Make sure the box next to the stayer is checked.
 - b. Click **Mark as Viewed**.

User nick name: [] Search: [] Create new user: [] Show floor plan: []

Sales Register New Accounts **Viewing list** Viewed homes Bed status Waiting List Conversions Occupancy

Viewing list

Select house: All House

From Date 13/10/2006 To Date 13/10/2006 Go

Visitor Name	Telephone	e-Mail	Houses	Viewing Date	SWTE Score
<input checked="" type="checkbox"/> Fred Monkey	1234567890	cvlists@inhouse.com.au	Monkey cage, Gorilla Cage, Orangutan Cage	13/10/2006	5.8

Remarks: Good bloke, welcome to stay

Save Comments Mark as viewed Reschedule Delete

Note: If you don't want someone to move in for whatever reason, simply add a comment to explain why and then with the check box next to them checked, click the **Delete** button.

What happens next?

After you have marked off a stayer as "viewed", they can book a room. Encourage them to do this on-line as soon as possible.

If you accept on-line payments, stayers can make their booking and pay their deposit to confirm their booking. After they have done that and completed the on-line stayer agreement, all you have to do is to go to the arrivals list for that day and complete the check in. That's covered under Manage Stayers.

On the other hand, if you don't accept on-line payments, they can make their booking on-line, but they will have to pay you their deposit directly to you to confirm their booking.

Confirming Bookings

If a stayer has booked a bed and you don't accept on-line payments, they will have to pay you directly to confirm the booking. The stayer will have received a reference number when they book. Get that number off them. All bookings that are pending payment are listed under Sales.

To confirm a booking:

1. Click **Sales**.
2. Click the booking Ref No.

The screenshot shows the SWTE Accommodator Guide interface. At the top, there's a navigation bar with links: User nick name, Search, Go, Create new user, Show floor plan. Below this is a sub-navigation bar with links: Sales Register, New Accounts, Viewing list, Viewed homes, Bed status, Waiting List, Conversions, Occupancy. The 'Sales Register' link is circled in pink. Below the sub-navigation bar is the 'Sales Register' section. It has a table with columns: Ref. No., Booking Date, Check In Date, Customer Name, Home, Bed, Status. The first row of data is: 2031, 13/10/2006, Merrill Monkey, Gorrilla Cage 42, Pending Payment. The 'Ref. No.' 2031 is circled in pink.

Ref. No.	Booking Date	Check In Date	Customer Name	Home	Bed	Status
2031	13/10/2006		Merril Monkey	Gorrilla Cage 42		Pending Payment

3. The amount to collect is shown.
4. Choose the payment method from the drop-down list.

5. Click **Confirm Booking**.

The screenshot shows a web application interface for booking management. At the top, there is a navigation bar with links: Sales Register, New Accounts, Viewing list, Viewed homes, Bed status, Wait, and Occupancy. Below this is a green header bar labeled "Booking details". The main content area displays booking information for "Gorrilla Cage Bed No. 42". The information includes: Request Number (2031), Customer Name (Merril Monkey), Booked for (13/10/2006 on 13/10/2006), Check In Date, Check Out Date, Deposit payable (\$ 250.00), Deposit paid (\$ 0.00), Ancillary charges (\$ 0.00), Balance payable (\$ 250.00), and Deposit payable (\$ 250.00). The Booking Status is "Pending Payment and its an Active Booking". The Payment Mode is set to "CASH". A pink circle highlights the "Confirm Booking" button at the bottom. A pink line points to the "Deposit payable" field, and a pink number "3" is next to it. A pink number "4" is next to the "CASH" dropdown menu. The text "The refundable amount is \$ 0.00" is also visible.

Home	Gorrilla Cage Bed No. 42
Request Number	2031
Customer Name	Merril Monkey
Booked for	13/10/2006 on 13/10/2006
Check In Date	
Check Out Date	
Deposit payable	\$ 250.00
Deposit paid	\$ 0.00
Ancillary charges	\$ 0.00
Balance payable	\$ 250.00
Deposit payable	3 \$ 250.00
Booking Status	Pending Payment and its an Active Booking
Payment Mode	4 CASH
The refundable amount is \$ 0.00	
Confirm Booking	Cancel Booking
Cancel	

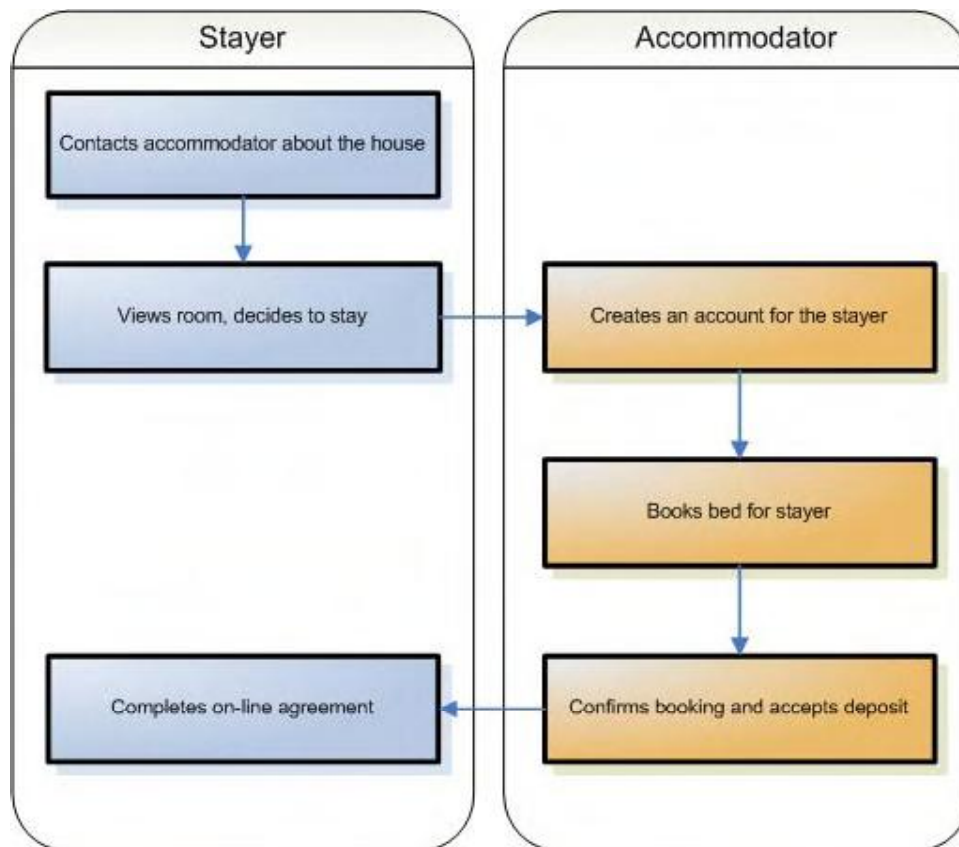
What happens next?

Now that the stayer has confirmed their booking, they can then complete the on-line agreement. They can do this any time before they move in. After they have done that, they can go away and pack. When they arrive on the day, all that's left for you do is arrive them in the system and if you have community tasks, allocate them a house zone to clean. Complete the check-in by showing them to their room and handing them their keys. That's covered under Manage Stayers.

Accommodator-Driven Sales

The following flowchart provides an overview of the sales process where a stayer directly contacts the accommodator (eg by phone).

The accommodator creates the user account and books the bed for the stayer. The account should be created when the prospective stayer contacts the accommodator about the house. The accommodator can then either book the bed directly or book the stayer in to view the house.



Refer to your SWTE Start documentation for information on:

- Creating a stayer account
- Finding a stayer's account
- Adding to the viewing list
- Making a booking

When the stayer's booking has been confirmed, they can then complete the on-line agreement any time before they move in. When they arrive on the day, all that's left for you to do is to allocate them a zone to clean and complete the check-in by showing them to their room and handing them their keys. That's under *Manage Stayers*.

Other Functionality in Sales

There are other things that are worth looking at under sales.

Viewed homes

Use the filters to generate a list of everyone who's viewed your homes, along with their contact details so that you find out why they haven't moved in. You can add updated comments here if you need to.

Money-out: \$ 1122.85 Cash-in: \$ 1122.85 Departures: 0 Empty beds: 0
 Total balance: \$ 277.15 Cash balance: \$ 277.15 Bed change today: 0 Beds for sale: 0

User nick name: [] Search Go Create new user [] Show floor plan

Sales Register New Accounts Viewing list **Viewed homes** Bed status Waiting List Conversions

Occupancy

Viewed homes

Select house: All House

From date: 13/10/2006 To date: 13/10/2006 All

Visitor Name	Viewed Date	e-Mail	Telephone
<input type="checkbox"/> Fred Monkey	13/10/2006	cvlists@inhouse.com.au	1234567890
Houses Monkey cage, Monkey cage, Gorrilla Cage, Orangutan Cage			
Remarks Good bloke, welcome to stay			
<input type="checkbox"/> Christopher Monkey	13/10/2006	christopher@mailinator.com	0413189976
Houses Orangutan Cage			
Remarks			
<input type="checkbox"/> Zoo Man	13/10/2006	tech_support@pps.com.au	12345678
Houses Monkey cage			
Remarks			

Update

Bed Status

Use the filters to generate a report of all your beds, who's in them, what contract they're on and when it becomes available.

Money-out: \$ 1122.85 Cash-in: \$ 1122.85 Departures: 0 Empty beds: 0
 Total balance: \$ 277.15 Cash balance: \$ 277.15 Bed change today: 0 Beds for sale: 0

User nick name: [] Search Go Create new user [] Show floor plan

Sales Register New Accounts Viewing list Viewed homes **Bed status** Waiting List Conversions

Occupancy

Bed status

Filter By: All All Beds All House All Contract Types

From: [] To: [] Go

House Name	Zone No	Bed No	Occupant	Room Type	Gender	Status	Available Date
Monkey cage	7	11	Michelle Monkey	Twin (large)	Co-Ed	Occupied - Variable	
Monkey cage	7	12		Twin (large)	Co-Ed	Empty - Sold Simon Ford	10/09/2006
Monkey cage	8	21		Twin (large)	Co-Ed	Empty - Sold Fred Monkey	13/10/2006
Monkey cage	8	22		Twin (large)	Co-Ed	Empty - Sold Ziggy Monkey	18/05/2006
Monkey cage	9	31	Zac Monkey	Twin (large)	Co-Ed	Occupied - Variable	
Monkey cage	9	32	Milly Monkey	Twin (large)	Co-Ed	Occupied - Variable	

Waiting List

If you don't have any beds and people still want to move in, you can offer them a spot on the waiting list.



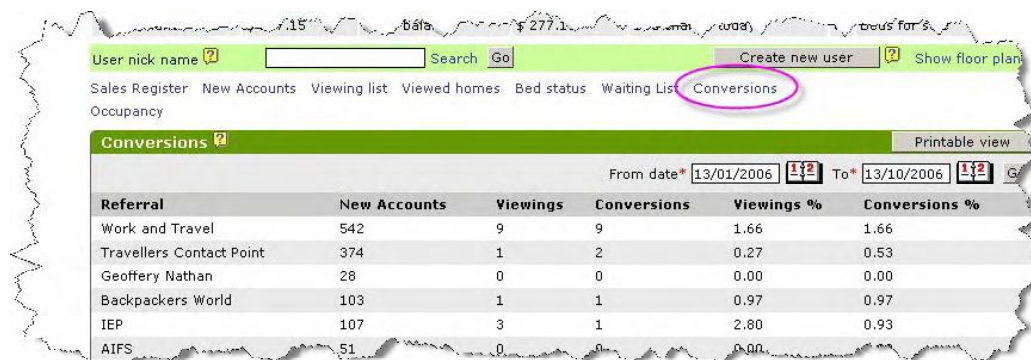
Name	Phone	Waiting Since	Contract period	Deposit paid	Offered
Jimmy Monkey	04321245	13/10/2006	14/10/2006 to 01/02/2007	\$ 1.00	0

Houses : Monkey cage, Gorilla Cage, Orangutan Cage

When a bed becomes available, click **Book Now** to offer them a bed. Click **Cancel** to remove that person from the list.

Conversion Statistics

Use the filters to generate a report of see where new accounts were referred from, how many of them viewed and how many of those viewings were converted into bookings for beds.



Referral	New Accounts	Viewings	Conversions	Viewings %	Conversions %
Work and Travel	542	9	9	1.66	1.66
Travellers Contact Point	374	1	2	0.27	0.53
Geoffery Nathan	28	0	0	0.00	0.00
Backpackers World	103	1	1	0.97	0.97
IEP	107	3	1	2.80	0.93
AIFS	51	0	0	0.00	0.00

Occupancy Statistics

This report shows your occupancy rates as a percentage on a monthly basis.



House Name	Jan %	Feb %	Mar %	Apr %	May %	Jun %	Jul %	Aug %	Sep %	Oct %	Nov %	Dec %	Avg %
Monkey cage - 2006			22.22	12.59	26.88	65.93	77.78	75.27	70.37	66.67			52.21
Gorilla Cage - 2006			29.49	57.22	69.89	101.11	87.17	85.71	85.71	84.52			75.10
Orangutan Cage - 2006						25.00	64.11	62.50	72.50	75.00			59.82
Average	0.00	0.00	17.24	23.27	32.26	64.01	76.35	74.49	76.19	75.40	0.00	0.00	62.38

Accounting

While the SWTE system has some pretty powerful reporting tools to help you manage your accounts, it is not an accounting package. It can tell you where your money's coming from and where it's going in relation to the accommodation side of your business, but doesn't record everything.

It records:

- credit card outgoings
- all income related to the accommodation and sell items (rewards)
- all cash outgoings issued through the system
- cash or credit card deposit refunds

Your balance report shows all accommodation income and deposit income, all deposit outgoings as well as all cash outgoing. It doesn't record bills you pay using your cheque book or banking transfer.

To properly balance your accounts you need to import your transactions into your accounting system and then enter all cheques written.

Use this to control your cash spending when you're not around to make payments yourself. Instead of having a queue of people waiting on your door step to grab money off you, have them request payment on-line. You can then approve it in your own time over the internet.

We won't go everything that's under accounting. Click on each of the links and use the help to find about the things that we don't cover here.

The screenshot shows the SWTE system interface. On the left is a vertical menu with options: Task manager, Process Requests, Manage Stayers, Inventory, Reward Programs, Notice Board, Jobs, Settings, Sales, Accounting (highlighted in orange), and Support. The main area displays the 'Balance report' form. At the top, there are links: Balance report, Account codes, Cash repayments, Bed nights report, Security deposits, Cash in hand Report, Debtors/Liabilities, Manage float, Revoke fines, Transactions report, Income by Zone, and SWTE Invoices. Below these links are 'Register online payments' and 'Direct Debit Authority'. The 'Balance report' form has a 'Printable view' link. It includes a 'House' dropdown set to 'All Houses', a 'From' date of '06/10/2006', a 'To' date of '13/10/2006', and a 'Go' button. Below this are input fields for 'Cash balance at COB' and 'Card Balance at COB', both showing '\$ 0', with a 'Change' button. A summary table is displayed:

Average Rate Per Person	Average Rate Per Bed	Total Security Deposit
150.00	100.00	4000.00

The Balance Report

The balance report gives you a summary of money in and out over a defined period. You can filter by house and date and drill down to see more detail.

To run the balance report:

1. Click **Accounting**.
2. Click **Balance report**.

A summary of transaction for the selected period is shown.

This screenshot shows the 'Balance report' form with the same top navigation and summary table as the previous image. Below the summary table, a detailed transaction table is displayed:

Account Code	Account Description	In	Out	Balance
1	RENT PAYMENT	\$ 8350.00	\$ 342.85	\$ 8007.15

3. You can filter the report to suit your requirements:
 - a. Select the house.
 - b. Enter the start and end dates for the report.
 - c. Enter the cash and card balances and click **Change**.
 - d. To print the report, click **Printable view** then **Print**.

The screenshot shows the 'Balance report' page. Annotations include:

- a**: Points to the 'House' dropdown menu set to 'All Houses'.
- b**: Points to the date range 'From 06/10/2006 To 13/10/2006'.
- c**: Points to the 'Cash balance at COB' field (set to 150) and the 'Card Balance at COB' field (set to 250), with an arrow pointing to the 'Change' button.
- d**: Points to the 'Printable view' button.

Account Code	Account Description	In	Out	Balance
1	RENT PAYMENT	\$ 8350.00	\$ 342.85	\$ 8007.15
3	KEY DEPOSIT	\$ 500.00	\$ 750.00	\$ -250.00
5	DEPOSIT LOAN	\$ 0.00	\$ 0.00	\$ 0.00
8	OTHER CASH PAYMENTS	\$ 0.00	\$ 0.00	\$ 0.00

4. To see more detail about for an account, click its description.

Account Code	Account Description	In	Out	Balance
1	RENT PAYMENT	\$ 150.00	\$ 0.00	\$ 150.00
3	KEY DEPOSIT	\$ 250.00	\$ 0.00	\$ 250.00
5	DEPOSIT LOAN	\$ 0.00	\$ 0.00	\$ 0.00
8	OTHER CASH PAYMENTS	\$ 0.00	\$ 0.00	\$ 0.00
9	CASH BACKS USED	\$ 0.00	\$ 0.00	\$ 0.00
11	ANCILLARY CHARGES	\$ 0.00	\$ 0.00	\$ 0.00

Issuing Cash

Make it a staff policy to never hand out cash unless it has been approved. All approved payments are on the cash repayments list and the claimant can simply approach your staff to be paid. Staff can pay them if they're on the list, leaving your out of the loop.

Use this procedure to update your account balance after issuing cash.

To issue cash:

1. Click **Accounting**.
2. Click **Cash repayments**.
3. Click **Issue**.

The screenshot shows the 'Cash repayments' page. Annotations include:

- Cash repayments**: The link in the top navigation bar is circled.
- Issue**: The 'Issue' button in the table's footer is circled.

Staff Name	Request Date	Request Type	Amount	Approved By	Approved Date
chris virtue	13/10/2006	Rent refund	\$ 50.00	chris virtue	13/10/2006

We overcharged him by \$50 due to a date error

The Bed Nights Report

The Bed nights report shows a summary of how many nights each bed was occupied over a defined period and whether those bed-nights were operator or enterprise bed nights.

To run the bed nights report:

1. Click **Accounting**.
2. Click **Bed nights report**.
3. Select the house to view or leave at All Houses.
4. Enter the start and end dates of the report period.
5. Click **Go**.

Total balance \$ 277.15 Cash balance \$ 277.15 Bed change today 0 Beds for sale

User nick name Search Create new user Show floor plan

Balance report Account codes Cash repayments **Bed nights report** Security deposits Cash in hand Report

Debtors/Liabilities Manage float Revoke fines Transactions report Income by Zone SWTE Invoices

Register online payments Direct Debit Authority

Bed Nights Report

House Start Date End Date

House	Enterprise bed nights	Rate	Total	
Monkey cage	20	1.00	20.00	Click for details

6. The total number of operator and enterprise bed-nights is shown. To see more detail, i.e. who's in each bed and how many nights they were there, click **Click for details**.

Total balance \$ 277.15 Cash balance \$ 277.15 Bed change today 0 Beds for sale

User nick name Search Create new user Show floor plan

Balance report Account codes Cash repayments Bed nights report Security deposits Cash in hand Report

Debtors/Liabilities Manage float Revoke fines Transactions report Income by Zone SWTE Invoices

Register online payments Direct Debit Authority

Bed Nights Report

House Start Date End Date

House	Enterprise bed nights	Rate	Total	
Monkey cage	20	1.00	20.00	Click for details
Gorilla Cage	0	1.00	0.00	Click for details
Orangutan Cage	0	1.00	0.00	Click for details

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The detailed breakdown of operator and enterprise bed-nights is shown, which can be printed.

Total Bed Nights from 01/06/2006 to 16/06/2006

Operator Bed Nights				
Login ID	Name	Contract Start Date	Contract End Date	Total Bed Nights
monkey2	Micky Monkey	27/03/2006	15/06/2006	14
monkey1	Fred Monkey	15/05/2006	06/06/2006	5
monkey3	Michelle Monkey	17/05/2006	04/07/2006	15
monkey10	Ziggy Monkey	18/05/2006	31/07/2006	15
monkey24	Marcia Monkey	06/06/2006	05/08/2006	10
tlight	Traffic Light	15/06/2006	15/08/2006	1
Total Bed Nights				60

Enterprise Bed Nights				
Login ID	Name	Contract Start Date	Contract End Date	Total Bed Nights
monkey4	Zac Monkey	19/05/2006	31/07/2006	15
monkey5	Milly Monkey	25/05/2006	25/07/2006	15
Total Bed Nights				30

[Print](#)

The Security Deposits Held Report

The Security deposits held report provides a list of all the bonds that you hold on behalf of stayers.

To run the bonds held report:

1. Click **Security deposits**.
A list of all the deposits held in all houses is shown.
2. If you want to view the deposits held in a particular house, select the house and click **Go**.
3. If you want to print the report, click **Printable view** then **Print**.
4. If want you to top a lodger's deposit, you can do it from here by clicking **Add deposit**.

Security deposits [Printable view](#)

All Houses [Go](#)

Stayer Name	House Name	Bed No	Deposit Balance	
Michelle Monkey	Monkey cage	11	\$ 160.00	Add deposit
Zac Monkey	Monkey cage	31	\$ 150.00	Add deposit
Milly Monkey	Monkey cage	32	\$ 170.00	Add deposit
Micky Monkey	Monkey cage	41	\$ 170.00	Add deposit
Traffic Light	Monkey cage	42	\$ 190.00	Add deposit
Dom Wise Jarvis	Gorilla Cage	11	\$ 160.00	Add deposit

The Cash on Hand Report

In the balance report, there is provision for staff to enter what was in the till on a particular day. The cash on hand report provides a summary of that over a defined period.

To run the cash in hand report:

1. Click **Cash in hand Report**.
2. Enter the date range for the report and click **Go**.

Total balance: \$ 277.15 Cash balance: \$ 277.15 Balance to day: 0 Beds for sale: 0

User nick name: Search Go Create new user Show floor plan

Balance report Account codes Cash repayments Bed nights report Security deposits **Cash in hand Report** Debtors/Liabilities Manage float Revoke fines Transactions report Income by Zone SWTE Invoices Register online payments Direct Debit Authority

Cash in hand Report Printable view

From: 13/10/2006 To: 13/10/2006 Go

Date	Input by	Modified by	Date	Cash balance	Card Balance
13/10/2006	chriv	chriv	13/10/2006	\$ 150.00	\$ 250.00

Debtors/Liabilities Reports

This report provides you with a list of stayers who have paid rent in advance at a particular date (liabilities) and stayers who still owe under their contract (debtors).

To run the debtors and liabilities reports:

1. Click **Debtors/Liabilities**.
2. Enter the date for the report
3. Select liabilities or debtors from the list.
4. Click **Go**.

User nick name: Search Go Create new user Show floor plan

Balance report Account codes Cash repayments Bed nights report Security deposits Cash in hand Report **Debtors/Liabilities** Manage float Revoke fines Transactions report Income by Zone SWTE Invoices Register online payments Direct Debit Authority

Debtors/Liabilities Printable view

Input Date: 13/10/2006 Debtors Go

Lodgers Name	Rent Amount	House Name	Contact No
No debtors/liabilities found.			

Managing Your Float

Use this function to record adjustments to your float.

Note: How you manage your float is up to you. Just be mindful that what you enter here will affect your balance.

To run the debtor report:

1. Click **Manage float**.
2. Complete all fields as necessary, including useful comments.
3. Click **Submit** when finished.

4. The new float balance updates:

Revoking Fines

You can revoke fines if you think someone has been harshly done by.

Date	Description	Stayer name	House	Out
13/10/2006	Late rent fine charged to your account	Johnette Monkey	Orangutan Cage	\$ 10.00 revoke
11/10/2006	Late rent fine charged to your account	emma louise toohill	Gorilla Cage	\$ 10.00 revoke
11/10/2006	Late rent fine charged to your account	Traffic Light	Monkey cage	\$ 10.00 revoke
10/10/2006	Late rent fine charged to your account	peter painter	Orangutan Cage	\$ 10.00 revoke
09/10/2006	Late rent fine charged to your account	Jilly Monkey	Orangutan Cage	\$ 10.00 revoke

The Transaction Report

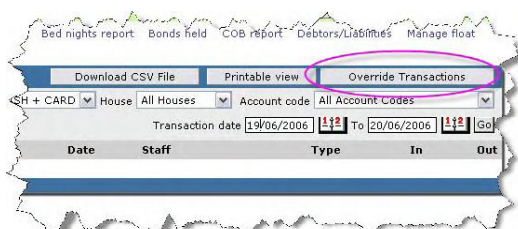
The transaction report provides a list of all the transactions conducted by stayers over a period. You can override transactions if you need to.

To run the transaction report:

1. Click **Transaction report**.
2. Select your filtering options and click **Go** when ready.



4. A list of transactions according to your filtering is shown.
 - a. To download the report as a CSV (text file) for importing into other programs (e.g. spreadsheet, accounting program), click **Download CSV File**.
5. To print the list, click **Printable view** then **Print**.
6. To override transactions:
 - a. click **Override Transactions**:



- b. Select your filtering options and click **Go**.
- c. To modify a transaction:
 - i. Click the radio button next to the transaction to modify.
 - ii. Correct details as required.
 - iii. Click **Modify Transaction**.



- d. To delete a transaction:
 - i. Click the radio button next to the transaction to delete.
 - ii. Click **Delete Transaction**.

The Income by Zone Report

This report provides you with a list of bedrooms and how much money you made from them.

To run the zone income summary report:

1. Click **Income by Zone**.
2. Select your filtering options and click **Go**.

House Name	Zone No	Zone Name	Bed No	Income
Gorilla Cage	4	Bedroom 1	11	\$ 900.00
Gorilla Cage	4	Bedroom 1	12	\$ 250.00
Gorilla Cage	5	Bedroom 2	21	\$ 1050.00
Gorilla Cage	5	Bedroom 2	22	\$ 750.00
Gorilla Cage	6	Bedroom 3	31	\$ 1200.00
Gorilla Cage	6	Bedroom 3	32	\$ 750.00
Monkey cage	10	Bedroom 4	41	\$ 1200.00

Support and Upgrades

Click the Support link to:

- turn on or off search engine listing for your beds
- vary the number of beds licenced under SWTE
- access training manuals
- view your terms and conditions

Product Upgrade

Current Licence

Current product	SWTE Pro
Current term	09/09/2006 to 09/09/2007
Search engine listing	No, Do not list my vacancies
Licensed beds	24
Current licence fee (Paid)	\$ 394.20
Licence anniversary (due)	09/09/2007

Licence upgrade request

Search engine listing: ☐ Yes, please list my vacancies ☒ No, do not list my vacancies

Licensed beds: (Note: Licensed beds determine how many beds you are able to setup on your system)

Available products: ☒ SWTE Pro

Appendix

Sample Floor Plan

<p>1. Bedroom 1 2. Bedroom 2 3. Bedroom 3 4. Bedroom 4 5. Bedroom 5 6. Hallway 1, Lounge, Front yard 7. Stairwell, Bedroom 1 8. Kitchen 9. Laundry, Balcony, Car park 10. Hallway 2, Bedroom 2 11. 12. 13. 14. 15. 16.</p>	<p>HOUSE: Monkey Cage</p> <p>FLOOR 1 & 2 OF CODE: Tactically</p> <p>Once complete fax to: 07 5472 0731</p>
<p>APPROVED BY: Emma Tachell</p> <p>SIGNATURE: <i>[Signature]</i></p> <p>DATE: 10/6/00</p>	<p>Floor 1</p> <p>Floor 2</p>

(Floor Plan Design will cost \$5 per room)

Grid Paper

ROOM ZONES - (Number each zone)

1.

2.

3

4.

5.

6.

7.

8.

9.

10.

11.

12.

13.

14.

15.

16.

SYMBOLS TO USE

= Single Bed

= Double Bed

= Bunks

= Storage, lockers
cupboards etc

= Stairs

= Internet

= Rubbish Bin

= Cook tops

= Fridge

= Washing Machine

= Dryer

= Shower

= Bath

= Toilet

HOUSE: _____ FLOOR: _____ OPERATOR CODE: _____

Once complete fax to:
1300 662 063

APPROVED BY: _____ SIGNATURE: _____ DATE: ____/____/____

{ Please print name }

{ Floor Plan Design will cost \$5 per room }

{ Floor Plan Design will cost \$5 per room }

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