



**CloudBeds PMS**  
**Configuration Guide**

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V1.0

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# Introduction

This document describes the integration between Tevalis and CloudBeds. Included in this documentation is all the configuration required for the integration.

CloudBeds is a Property Management System aimed primarily at hotels to manage rooms and bookings. As a PMS system, CloudBeds can also be used as a primary point of reconciliation for a company's finance team.

The integration communicates with CloudBeds using the CloudBeds API.

## Functionality Supported

Please see the [CloudBeds Functionality Document](#) for more information on what the integration is capable of.

## Preliminary Support Information

### How do I sign up?

As an award-winning EPOS, Enterprise, and Integrations partner, Tevalis can tailor our technology offering to create the perfect tech stack for your business.

[Visit our website](#) to find out more and speak with one of our experts today to get your consultation.

### How do I get support from Tevalis?

Tevalis' Integrations Team is trained to identify and rapidly solve any integration issues, working closely with our partners to ensure minimal impact on your operations. This team can be reached by direct phone, email, or on our website.

### How do I disconnect the app?

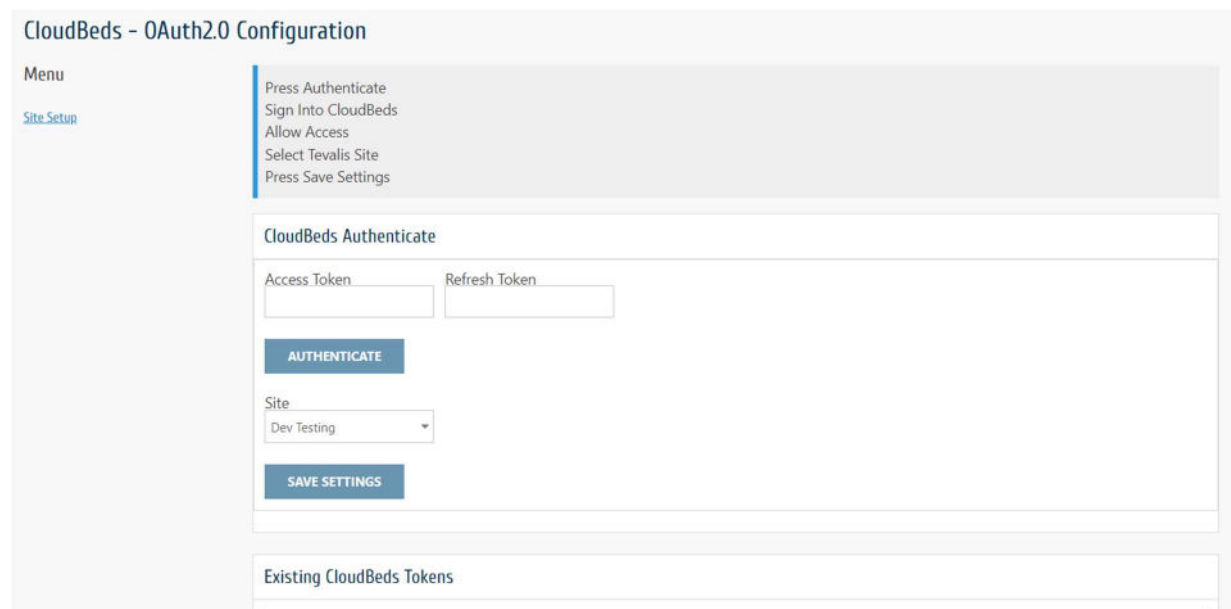
Please get in touch with Tevalis' support team who will assist you with this. To disconnect from the Cloudbeds app, please view their [Disconnect app article](#).

# Authentication

## Portal Integration Page

The CloudBeds integration uses OAuth2.0 for authentication.

The initial authentication must be completed by a user who has credentials to log into the CloudBeds portal – This can be done through the CloudBeds page on the Tevalis Portal.

A screenshot of the "CloudBeds - OAuth2.0 Configuration" page. It features a "Menu" on the left with a "Site Setup" link. The main content area has a list of instructions: "Press Authenticate", "Sign Into CloudBeds", "Allow Access", "Select Tevalis Site", and "Press Save Settings". Below this is a "CloudBeds Authenticate" section with two input fields for "Access Token" and "Refresh Token", an "AUTHENTICATE" button, a "Site" dropdown menu currently set to "Dev Testing", and a "SAVE SETTINGS" button. At the bottom, there is a section for "Existing CloudBeds Tokens".

Complete the credentials configuration by following the instructions listed on the Portal page.

- Press Authenticate
- Sign Into CloudBeds
- Allow Access
- Select Tevalis Site
- Press Save Settings

Once this is complete, the details saved against the site should be copied into the POS settings through Centralised Management.

# Configuration

## System Settings

Setting Name	Description
PMS Auth Endpoint	Not used.
PMS Auth Token	CloudBeds access token.
PMS Blocked House Accounts	Not used.
PMS Can Post Criteria	Not used.
PMS Charge Type	1 – Fully Itemized. Each Item Sent Individually.
PMS Currency Code	GBP
PMS Default Payment Code	The default code used when there are no codes setup against a tender type.
PMS Default Sale Code	Not used.
PMS Endpoint	Used to set the location of the PMS provider's service.
PMS Hotel ID	Used to set the property code of the current site required to get relevant information from the PMS provider's service.
PMS Inclusive Breakfast Product ID	Not used.
PMS Integration	Used to select the PMS integration to integrate with through the ITevalisPMS logic. Should be 17, for CloudBeds.
PMS Login ID	Used to set the operator required to access the PMS provider's service.
PMS Login Password	Used to set the password required to access the PMS provider's service.
PMS Meal Codes	Not used.
PMS Mixed Tenders House Account	Default House Account to which revenue is posted if multiple different tenders are used on a transaction.
PMS Post Revenue	If true, sales and tenders are sent to CloudBeds after each transaction is finalised.
PMS Single Charge Text	Not used.
PMS Cashier Code	Not used.
PMS App Key	CloudBeds refresh token.

## Payment Methods

- IPMS Room Charge  
Allows the user to charge the bill to a Reservation in CloudBeds.
- IPMS House Accounts Charge  
Allows the user to charge the bill to a House Account in CloudBeds

## Tender PMS Posting Codes

- PMS Posting Code  
Used for Charge to Room, Charge to HA and Revenue Post to record POS tenders.

## Till Config

- Master Terminal  
This is used to upload revenue to CloudBeds after each transaction is finalized.  
This is used to download the codes, rooms & house accounts into the database.

## Function Keys

- ITevalisPMS Reservation Lookup  
Please see the CloudBeds Functionality Guide for more information on this function key.
- Finalise Configurable  
Finalise Configurable Accepts Both the IPMS Room Charge and the IPMS HouseAccount Charge payment methods.

# Support

## Debugging

All API requests made to CloudBeds are stored in the Integration Debug log file. These files contain both the request and the response and are grouped together in singular requests. Any errors are written to the error log.

## Charge Type Example

Example Transaction from the EPOS:



## Full Itemized

When "PMS Charge Type" is set to Fully Itemized (1), a single charge per item will be sent to the PMS, as per the screenshot below.

RESERVATION ID	DATE/TIME	NAME	ROOM	TYPE	NOTES	QUANTITY	DEBIT	CREDIT
7223070214255	04/26/2023 11:59 PM	Raj Tevalis	DK(7)	Room rate - Deluxe King DK(7)			\$159.00	
7223070214255	04/26/2023 11:59 PM	Raj Tevalis	DK(7)	Tax DK(7)			\$15.90	
7223070214255	04/26/2023 08:08 PM	Raj Tevalis	DK(7)	Vodka DK(7)		1	\$5.00	
TOTAL							\$179.90	\$0.00

Refund  Pending

## Grouped By Code

CloudBeds does not support Grouped by Code format.

## Single Charge

CloudBeds does not support Single Charge format.