

SwiftInvoicePro — 30-Day Pilot Guide for Hotels

Welcome. This guide walks your team through exactly what happens from the moment you click "**Request Pilot Access**" on our pricing page to the end of your 30-day free evaluation.

Estimated total setup time: **under 60 minutes**. No billing during the pilot.

At a Glance — The 7 Stages

#	Stage	Who	Time
1	Submit pilot request	Hotel	2 min
2	Confirmation & kickoff call	SwiftInvoicePro	within 1 business day
3	Account provisioning	SwiftInvoicePro	same day
4	PMS connection (Mews / Opera)	Hotel + SwiftInvoicePro	15–30 min
5	Invoice branding & VAT setup	Hotel	15 min
6	Live test checkout	Joint	10 min
7	Go-live & 30-day evaluation	Hotel	30 days

Stage 1 — Submit the Pilot Request

On the **Pricing** page (/pricing), scroll to the indigo "**Join the live pilot program**" box and fill in:

- **Hotel name** — your legal trading name
- **PMS** — e.g. Mews, Opera Cloud, Cloudbeds, Apaleo
- **Work email** — the person who will own the integration (usually GM, Revenue Manager, or IT lead)
- **GDPR consent** — tick the box so we may lawfully contact you

Click **Request Pilot Access**. You will see a green confirmation message and receive a copy of your submission by email.

***What we store:** only the fields above, plus a timestamped IP address for consent audit (GDPR Art. 7). No card details are required.*

Stage 2 — Confirmation & Kickoff Call

Within **one business day** our onboarding engineer will email you to:

1. Confirm the 30-day pilot start date.
2. Book a 30-minute kickoff call (Google Meet or Teams).
3. Send a short prerequisites checklist (see Stage 4).

Pilot clock starts **only after** your Mews/Opera connection is verified — not when you sign up. You will not be billed during or immediately after the pilot.

Stage 3 — Account Provisioning

We create:

- Your tenant organisation in SwiftInvoicePro
- Your Super-User login (the email you submitted)
- An empty invoice template branded with your hotel name (you customise it in Stage 5)

You receive a magic-link email — click it to set a password and land on /dashboard.

Stage 4 — Connect Your PMS

If you use Mews

1. In Mews **Marketplace**, search **SwiftInvoicePro** and click **Connect**.
2. Mews shows a token — copy it.
3. In SwiftInvoicePro, go to **Settings** → **Mews Connection** (/mews-connection) and paste:
 - Client Token (we provide)
 - Access Token (from Mews)
1. Click **Test Connection**. A green tick confirms success.
2. We auto-subscribe to the `Reservation.updated` webhook — no manual webhook setup required.

If you use Opera Cloud (OHIP)

1. Provide your OHIP `hotelId`, `appKey`, and OAuth credentials to our engineer via the secure intake link in your kickoff email.
2. We configure the connection from our side and confirm by email.

Tokens are encrypted at rest (AES-256-GCM). Only your hotel managers can view connection status; no one — including SwiftInvoicePro staff — can read the raw tokens after they are saved.

Stage 5 — Invoice Branding & VAT

Go to **Invoice Settings** (/invoice-settings) and configure:

Field	Example
Hotel legal name	Maison Aurelia Ltd
VAT / Tax number	GB123456789
Invoice prefix	MA-
Starting sequence	10001
Default VAT rate	20% (UK) / 19% (DE) / 10% (FR room)
Logo upload	PNG, max 1 MB

Field	Example
Footer text	Bank details, terms, thank-you note
Default sender email	invoices@yourhotel.com

Click **Save**. Generate a test PDF from the **Preview** button to confirm it looks right.

Stage 6 — Live Test Checkout

With your engineer on the call:

1. Create a dummy reservation in Mews/Opera with a real test guest email (yours).
2. Check the guest out in the PMS.
3. Within **10 seconds**, SwiftInvoicePro:
 - Receives the checkout webhook
 - Pulls the full folio (room, F&B;, extras, taxes)
 - Generates a branded PDF invoice
 - Emails it to the guest
1. You receive the test invoice in your inbox. Open it, confirm branding, VAT, totals.

A live counter on `/hotel-health` shows the end-to-end latency for each event.

Stage 7 — 30-Day Evaluation

For the next 30 days, every real checkout in your PMS triggers an automatic branded invoice to the guest. You also get:

- **Hotel Health dashboard** (`/hotel-health`) — webhook latency, PDF render time, email delivery status, retry/DLQ counts.
- **Invoice archive** (`/invoices`) — search, re-send, void, split, or attach to a corporate account.
- **Corporate billing** (`/corporate`) — link recurring corporate guests to a master account.
- **Dedicated Slack / WhatsApp channel** with our engineer for the full 30 days.

What we measure together

- $\geq 99\%$ successful auto-invoice rate
- ≤ 10 second checkout-to-email latency (p95)
- Zero duplicate invoice numbers
- Guest satisfaction with branded invoice format

Day 25 — Review call

We meet for 30 minutes to review the dashboard metrics, gather feedback, and discuss whether you'd like to continue on a paid plan (priced per room — see `/pricing`).

Day 30 — Decision

- **Continue:** we move you onto a paid plan. No data migration needed.

- **Pause:** we suspend auto-invoicing. Your data stays available read-only for 90 days.
- **Withdraw:** under GDPR you may request full deletion at any time — email **richrom41@hotmail.com** and we erase your tenant within 30 days.

Security & Compliance Quick-Reference

- **Hosting:** EU region, encrypted at rest and in transit (TLS 1.3).
- **Tokens:** AES-256-GCM, never logged or returned to the client.
- **Webhooks:** HMAC SHA-256 signature verification on every inbound event.
- **Access control:** Row-Level Security per tenant; staff cannot read across hotels.
- **GDPR:** Lawful basis = consent (Art. 6(1)(a)). Full audit trail of consent timestamp, IP, and statement text.
- **Data subject rights:** access, rectification, erasure, portability — honoured within 30 days.
- **Sub-processors:** Mews/Opera (your PMS), Cloudflare (hosting), email gateway. Full list on request.

Who to Contact

Need	Contact
Pilot enquiries & onboarding	richrom41@hotmail.com
Technical / integration support	Your dedicated engineer (assigned in Stage 2)
GDPR / privacy requests	richrom41@hotmail.com
Billing (post-pilot only)	richrom41@hotmail.com

Checklist — Print Before Your Kickoff Call

- ☐ Hotel legal name and VAT number to hand
- ☐ PMS admin login (Mews / Opera)
- ☐ Logo file (PNG, transparent background preferred)
- ☐ Invoice prefix and starting sequence agreed internally
- ☐ Default VAT rate(s) for your jurisdiction
- ☐ Footer text (bank details, terms)
- ☐ Test guest email address ready
- ☐ 30-min slot booked with relevant stakeholder(s)

SwiftInvoicePro Ltd — Invoicing automation for hotels. Pilot terms: 30 days, no billing, no commitment, cancel any time.