



# Deem Travel: Partner Dashboard Training

**Day 2 – Travel Policies, Display Configurations and Rates**

**2017**

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# 1 Managing the Site Tabs – The Services Tab

The Partner Dashboard at the site level is made up of several tabs. These tabs include the Settings, Users, Services, Groups, Rules, Reports and the Profiles tabs of which all but the Profiles tab will be covered in these classes. The Profiles tab is covered in the Advanced User Data class.

## 1.1 Travel Display Configuration

What the traveler will see on the Travel Page of Deem is determined by settings in the Display Configuration. When a site is created, default display settings are pre-configured based on the template used to clone the site, or if the site was not the result of a template clone, the settings are the Deem defaults.

Once the Display Configurations have been set up, they are assigned to groups of travelers. When a site is created, the Everyone Group is established, but as the need for different travel requirements arise, new groups can be added. An example would be the VIP group. Groups are discussed in a later module.

1. Click the **Services** tab.
2. The **Services | Travel** page is displayed. Click the **Policy Display** link.

Settings	Users	Services	Groups	Rules	Reports	Profiles
<b>Services   Overview</b>						
<b>Travel</b> <ul style="list-style-type: none"><li>Travel Agency</li><li>Vendors</li><li>Travel Policy</li><li>Policy Display ←</li><li>Compliance Codes</li><li>Custom Fields</li><li>Alternate Airports</li><li>Site Payment Cards</li><li>Corporate Payment Cards</li><li>Private Rates</li><li>Hotel Per Diem</li><li>Reference Points</li><li>Restricted Countries</li></ul>		<b>Airport Parking</b> <ul style="list-style-type: none"><li>Configurations for Groups</li><li>Policies</li></ul> <b>Car Service</b> <ul style="list-style-type: none"><li>Configurations for Groups</li><li>Policies</li></ul>		<b>Expense</b> <p>Additional charges apply when Expense is enabled.</p> <ul style="list-style-type: none"><li>General Settings</li><li>Configurations for Groups</li><li>Load Default Expense Settings</li><li>Payer Management</li></ul> <b>Shipping</b> <ul style="list-style-type: none"><li>General Settings</li><li>Configurations for Groups</li><li>Provider Accounts</li><li>Policies</li></ul>		

3. The **Services | Display Configuration Management** page is displayed.

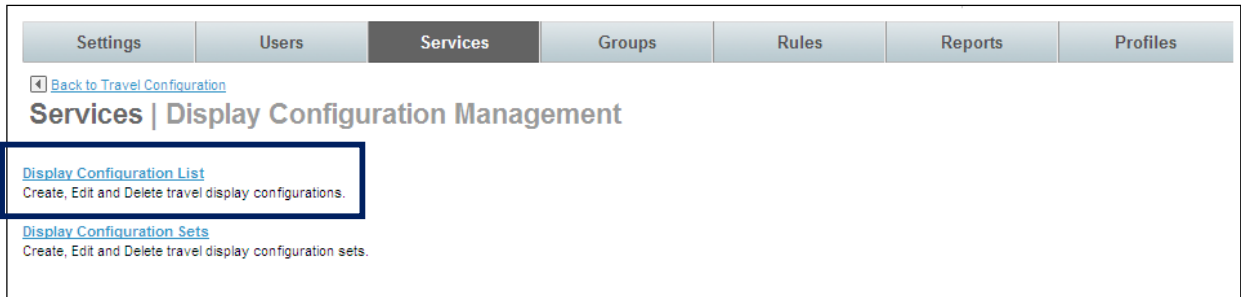
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**Note:** The **Display Configuration** page follows the List and Set structure discussed earlier. First we will look at the **List** of options.

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### 1.1.1 Display Configuration List Items

1. Click the **Display Configuration List** link.



Settings Users **Services** Groups Rules Reports Profiles

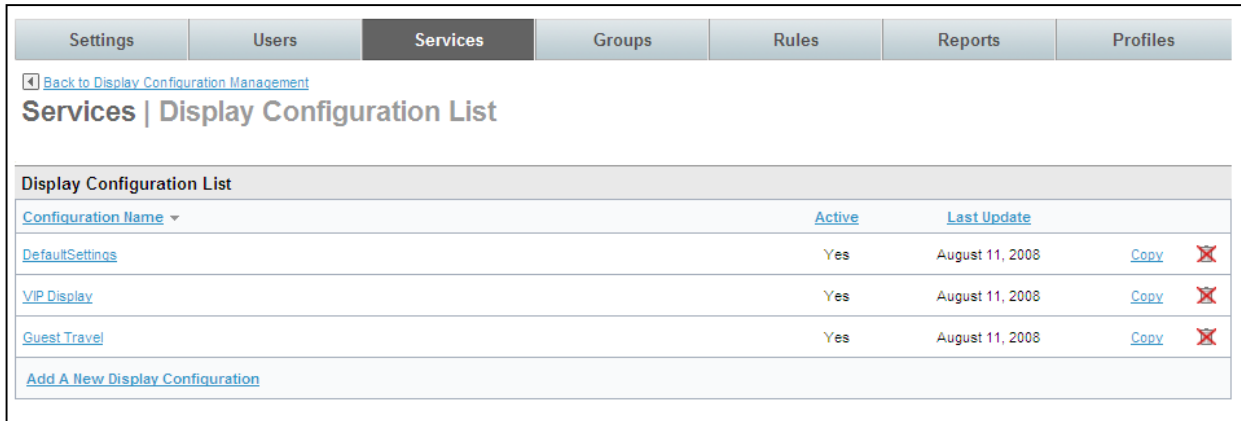
[Back to Travel Configuration](#)

## Services | Display Configuration Management

[Display Configuration List](#)  
Create, Edit and Delete travel display configurations.

[Display Configuration Sets](#)  
Create, Edit and Delete travel display configuration sets.

2. The **Services | Display Configuration List** page is displayed. The records displayed are the individual display policies established for this site. Click the **Add A New Display Configuration** link to add a new configuration or click the Configuration Name link to display an existing list.







Settings Users **Services** Groups Rules Reports Profiles

[Back to Display Configuration Management](#)

## Services | Display Configuration List

Display Configuration List

<a href="#">Configuration Name</a> ▾	<a href="#">Active</a>	<a href="#">Last Update</a>	<a href="#">Copy</a>	
<a href="#">DefaultSettings</a>	Yes	August 11, 2008	<a href="#">Copy</a>	
<a href="#">VIP Display</a>	Yes	August 11, 2008	<a href="#">Copy</a>	
<a href="#">Guest Travel</a>	Yes	August 11, 2008	<a href="#">Copy</a>	

[Add A New Display Configuration](#)

3. The **Services | Add or Edit** page is displayed. Complete the page:

The screenshot shows a web application interface with a navigation bar at the top containing tabs for Settings, Users, Services (selected), Groups, Rules, Reports, and Profiles. Below the navigation bar is a breadcrumb link: [Back to Display Configuration List](#). The main heading is **Services | Edit**. The page is divided into two main sections: **Travel Display Configuration** and **Policy Display Configuration**. In the Travel Display Configuration section, there is a checked checkbox for 'Activate Configuration', a text input field for 'Configuration Name' containing 'DefaultSettings', and radio buttons for 'Enable Gravel Experience' with 'No' selected. The Policy Display Configuration section includes radio buttons for 'Evaluate itineraries for compliance with travel policies' with 'Yes' selected, a text input field for 'Enter one or more email addresses that will receive travel authorization email replies' containing 'traveladministrator@yourcompany.com', and radio buttons for 'Display "Policy Compliant" on airline, hotel and rental car search matrix' with 'No' selected.

- **Travel Display Configuration:**
  - **Activate Configuration:** Select this checkbox to activate the display policy
  - **Configuration Name:** Enter a name for this display policy that will be meaningful when displayed in a list.
  - **Enable Gravel Experience:** Yes or No. This is reserved for future use.
- **Policy Display Configuration:**
  - **Evaluate itineraries for compliance with travel policies:** Yes or No. Selecting Yes will review all itineraries and flag out of policy trips.
  - **Enter one or more email addresses that will receive travel authorization email replies:** This field is currently not used, *but an email address must be entered because this is a required field.*
  - **Display "Policy Compliant" on airline, hotel and rental car search matrix:** Yes or No. This works in conjunction with **Evaluate itineraries for compliance with travel policies:** Yes or No above. If a trip is within policy, the message "Policy Compliant" will be displayed.

- **Air Shopping Display Configuration:**

**Air Shopping Display Configuration**

What mileage radius should the system use to offer alternate airports and cities when a user searches for a single airport or city?  miles

Select a method for shopping airline itineraries:

Select a method for shopping airline itineraries with a non-US origin or destination:

Enabled schedule based shopping for airline itineraries:

Default search method:

Select the earliest limit of the time range that will be used to search all US domestic and Canadian airline availability based on the user's requested time:

Select the latest limit of the time range that will be used to search all US domestic and Canadian airline availability based on the user's requested time:

Select the earliest limit of the time range that will be used to search all non-US domestic and non-Canadian airline availability based on the user's requested time:

Select the latest limit of the time range that will be used to search all non-US domestic and non-Canadian airline availability based on the user's requested time:

Enable shopping for unrestricted fare type:

Enable shopping for refundable fare type:

Select default fare type:

Enable shopping for First Class Cabin:

- **What mileage radius should the system use to offer alternate airports and cities when a user searches for a single airport or city?** Enter the number of miles away from the searched for airport that alternative airports will be displayed. Also select the unit of measure to use when displaying the distance. It is recommended that 60 – 75 miles be used to limit the number of returned flights.
- **Select a method for shopping airline itineraries:** Use super domain method or ITA are recommended methods.
- **Select a method for shopping airline itineraries with a non-US origin or destination:** With GDS price confirmation is the recommended setting.
- **Enabled schedule based shopping for airline itineraries:** May select *Use superdomain setting*, Yes or No. Alternative is *By Price*.
- **Default search method:** May select *User superdomain setting*, *by price* or *by schedule*
- **Select the earliest limit of the time range that will be used to search all US domestic and Canadian airline availability based on the user's requested time:** Times range from 1 hour to 1 day in hour increments. It is recommended that 2 hours be selected.
- **Select the latest limit of the time range that will be used to search all US domestic and Canadian airline availability based on the user's requested time:** Times range from 1 hour to 1 day in hour increments. It is recommended that 2 hours be selected.
- **Select the earliest limit of the time range that will be used to search all non-US domestic and non-Canadian airline availability based on the user's requested time:** Times range from 1 hour to 1 day in hour increments. It is recommended that 4 or 5 hours be selected because of fewer available flights.
- **Select the latest limit of the time range that will be used to search all non-US domestic and non-Canadian airline availability based on the user's requested time:** Times range

from 1 hour to 1 day in hour increments. It is recommended that 4 or 5 hours be selected because of fewer available flights.

- **Enable shopping for unrestricted fare type:** Display unrestricted fares?
- **Enable shopping for refundable fare type:** Display refundable fares?
- **Select default fare type:** Select *Lowest Available, Fares with no restrictions, or Fares that allow refunds.*

Enable shopping for First Class Cabin:	<input checked="" type="checkbox"/>	Name:	<input checked="" type="radio"/> Use default First	<input type="radio"/> Use custom:	<input type="text"/>
Enable shopping for Business Class Cabin:	<input checked="" type="checkbox"/>	Name:	<input checked="" type="radio"/> Use default Business	<input type="radio"/> Use custom:	<input type="text"/>
Enable shopping for Coach Class Cabin:	<input checked="" type="checkbox"/>	Name:	<input checked="" type="radio"/> Use default Coach	<input type="radio"/> Use custom:	<input type="text"/>
Enable shopping for Premium Coach Cabin:	<input type="checkbox"/>	Name:	<input checked="" type="radio"/> Use default Premium Coach	<input type="radio"/> Use custom:	<input type="text"/>
Enable shopping for disabled cabin classes:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Display Nearby Airports by default:	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Expand flight results to include non-stops when available:	Yes <input type="text"/>				
Enable flexible date and weekend search:	Use superdomain setting <input type="text"/> ⓘ				
Default the flight results sorting view to:	Use superdomain setting <input type="text"/>				
Display Additional SeatMap resources:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Seat Map Additional Site #1:	<input type="text"/>				
Seat Map Additional Site #1's URL:	<input type="text"/>				
Seat Map Additional Site #2:	Seatguru.com <input type="text"/>				
Seat Map Additional Site #2's URL:	http://www.seatguru.com <input type="text"/>				
Seat Map Additional Site #3:	SeatExpert.com <input type="text"/>				
Seat Map Additional Site #3's URL:	http://www.seatexpert.com <input type="text"/>				
Enable display of personalized flight results?:	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Use personalized flight results as default display?:	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Allow non- E-ticketable flight solutions?:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Enable display of IATA (YY) fares on codeshare flights?:	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Enable airline web fare booking capabilities?:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Enable carbon calculator?:	<input checked="" type="radio"/> Yes <input type="radio"/> No				
Allow anytime search for flights:	Use superdomain setting <input type="text"/>				
Allow Morning, Afternoon and Evening flight searches?:	Use superdomain setting <input type="text"/>				
Allow out of policy trips to be bookable?:	<input checked="" type="radio"/> Yes <input type="radio"/> No				

- **Enable shopping for First Class Cabin:** Select the **Name:** checkbox if this class of service will be displayed. Select the **Use default** radio button to use the default name, or if a custom name is to be displayed, select the **Use custom** radio button and enter the name in the box provided.
- **Enable shopping for Business Class Cabin:** Select the **Name:** checkbox if this class of service will be displayed. Select the **Use default** radio button to use the default name, or if a custom name is to be displayed, select the **Use custom** radio button and enter the name in the box provided.
- **Enable shopping for Coach Class Cabin:** Select the **Name:** checkbox if this class of service will be displayed. Select the **Use default** radio button to use the default name, or if a custom name is to be displayed, select the **Use custom** radio button and enter the name in the box provided.

- **Enable shopping for Premium Coach Cabin:** Select the **Name:** checkbox if this class of service will be displayed. Select the **Use default** radio button to use the default name, or if a custom name is to be displayed, select the **Use custom** radio button and enter the name in the box provided.

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**Note:** Any or all of the cabin classes may be selected for this configuration. These radio buttons only enable the display of the classes of service. They do not govern policy around the selections made by the traveler.

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- **Enable shopping for disabled cabin classes:** Yes or No. Will classes not selected be displayed to the traveler?
- **Display Nearby Airports by default:** Yes or No. Will nearby airports be automatically displayed to the traveler, or will they need to select the Nearby Airports checkbox while shopping for flights?
- **Expand flight results to include non-stops when available:** Selecting *Use superdomain setting* or Yes will allow the search results to be expanded to show non-stops when the search criteria otherwise would not have returned them. Selecting *No* will not expand the search results.
- **Enable flexible date and weekend search:** Selecting *Use superdomain setting* or Yes will display a matrix of flights available over several days to allow selection of the best flight solution. Selecting *No* will not display the matrix.
- **Default the flight results sorting view to:** Select *Use superdomain setting, Policy / Preferred, Cost, Departure, Arrival, Duration* from the drop down list to display search results in a defaulted sort.
- **Display Additional SeatMap resources:** Yes or No. Deem provides a general seat map for each type of plane. Additional information such as recline angle or knee space can be found on the web.
- **Seat Map Additional Site #1:** Enter the name to display on Deem for this web site.
- **Seat Map Additional Site #1 URL:** Enter the URL for the seat map web site.
- **Seat Map Additional Site #2:** Enter the name to display on Deem for this web site.
- **Seat Map Additional Site #2 URL:** Enter the URL for the seat map web site.
- **Seat Map Additional Site #3:** Enter the name to display on Deem for this web site.
- **Seat Map Additional Site #3 URL:** Enter the URL for the seat map web site.
- **Enable display of personalized flight results?:** Yes or No.
- **Use personalized flight results as default display?:** Yes or No.
- **Allow non-E-ticketable flight solutions?** Yes or No.
- **Enable display of IATA (YY) fares on codeshare flights:** Yes or No. This toggle enables or blocks faring solutions from ITA where the plating carrier has fares filed but no permission to issue tickets. An Example is the LHRFRA market where UA has fares filed for LH code share flights but an agency should not issue tickets on UA stock.
- **Enable airline web fare booking capabilities:** Yes or No. Web fares would include VMI Baby, Ryan Air and Easy Jet.
- **Enable carbon calculator:** Yes or No. A calculation of the pounds of carbon dioxide used for the trip is displayed to the traveler.
- **Allow anytime search for flights:** Currently the Air search time is set to be Morning (6am – 12pm) for departures and Evening (6pm – 12am) for return flights. Selecting *Use superdomain setting* or Yes will expand the display of flight search results to all available flights for the day of travel. The drop down will remain available to the traveler to select specific times. Selecting *No* will not change the defaulted display times.
- **Allow Morning, Afternoon and Evening flight searches?** Selecting *Use superdomain setting* or Yes will display options to search by morning, afternoon or evening – this is current behavior. Selecting *No* will not display this option.



- **Out of policy trips to be bookable?:** Selecting *Yes* makes out of policy flights selectable (they will still be called out of policy) and selecting *No* will not allow the selection of out of policy flights.

- **Train Shopping Display Configuration:**

**Train Shopping Display Configuration**

Select the maximum number of travelers that may be booked on any Train trip:

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**Designate behavior the system should use if the rate confirmed at time of booking varies compared to during shopping:**

Continue if fare decreases:  Yes  No

If yes, enter maximum allowed variance amount:  United States Dollar

Continue if fare increases:  Yes  No

If yes, enter maximum allowed variance amount:  United States Dollar

---

**Train service classes (displays in Trip Planner)**

Enable shopping for First Class Cabin:  **Name:**  Use default First  Use custom:

Enable shopping for Business Class Cabin:  **Name:**  Use default Business  Use custom:

Enable shopping for Coach Class Cabin:  **Name:**  Use default Coach  Use custom:

Allow out of policy trains to be bookable?:  Yes  No

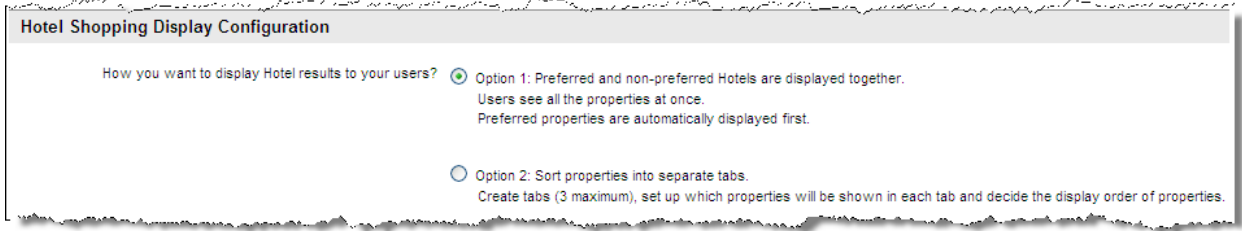
- **Select the maximum number of travelers that may be booked on any Train trip:** Select 1 – 6 from the drop down list.

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**Note:** At this time, 1 passenger can be supported.

- **Designate behavior the system should use if the rate confirmed at time of booking varies compared to during shopping:**
  - **Continue if fare decreases:** Select the *Yes* or *No* radio button.
    - **If Yes, enter maximum allowed variance amount:** Enter the number and select the currency from the drop down list.
  - **Continue if fare increases:** Select the *Yes* or *No* radio button.
    - **If Yes, enter maximum allowed variance amount:** Enter the number and select the currency from the drop down list.
- **Train service classes (displays in Trip Planner):**
  - **Enable shopping for First Class Cabin:** Select the checkbox to display this cabin class.
    - **Use default *First*:** Select the radio button to use the term *First* when displaying this cabin class, or select the **Use custom** radio button to use the value entered in the field.
  - **Enable shopping for Business Class Cabin:** Select the checkbox to display this cabin class.
    - **Use default *Business*:** Select the radio button to use the term *Business* when displaying this cabin class, or select the **Use custom** radio button to use a different term for this cabin class.
  - **Enable shopping for Coach Class Cabin:** Select the checkbox to display this cabin class.

- **Use default Coach:** Select the radio button to use the term *Coach* when displaying this cabin class, or select the **Use custom** radio button to use a different term for this cabin class.
  - **Out of policy trains to be bookable?:** Selecting *Yes* makes out of policy trains selectable (they will still be called out of policy) and selecting *No* will not allow the selection of out of policy trains.
- **Hotel Shopping Display Configuration:**
  - **How you want to display Hotel results to your users:**
    - **Option 1:** Preferred and non-preferred Hotels are displayed together. (End users will see all the properties at once. Preferred properties are automatically displayed first).

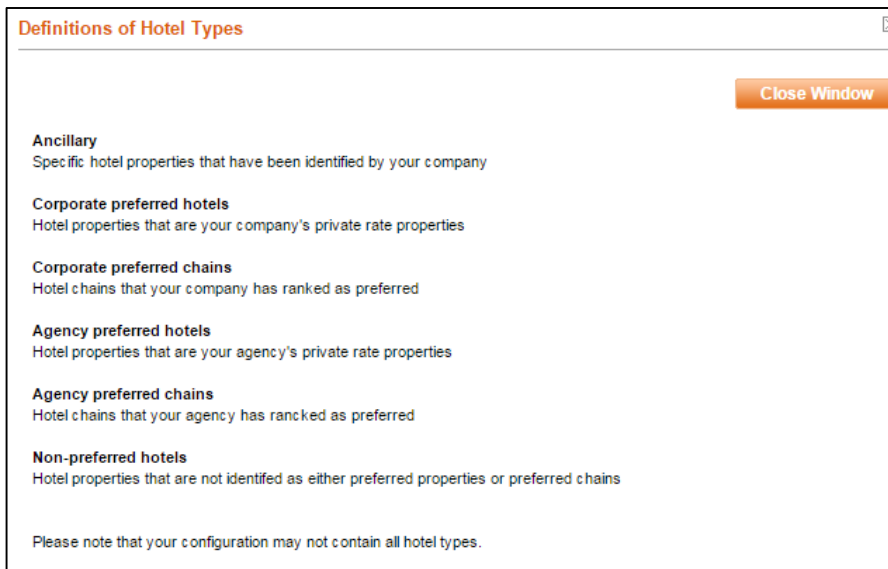


- **Option 2:** Sort properties into tabs (a 3 tab maximum). Name the tabs and depending on the mode of preference upload, the properties will be displayed in each tab. (End users will see properties on up to 3 tabs based on site preferences).

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**Note:** Click the **Hotel Type Definition** link to view more detail. Click **Close Window** to return.

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- 1 – How many tabs do you want? Select the 1, 2 or 3 radio button.
- 2 – Label the tabs with something your users will understand. They will see the tab labels when making their hotel selections.
- 3 – Check the boxes to select the hotel types for each tab.
  - The order of properties can be rearranged later and are shown by using the hotels dropdowns on the left.

- It is recommended at least one tab include "Non-preferred Hotels."

**Hotel Shopping Display Configuration**

How you want to display Hotel results to your users?

Option 1: Preferred and non-preferred Hotels are displayed together.  
Users see all the properties at once.  
Preferred properties are automatically displayed first.

Option 2: Sort properties into separate tabs.  
Create tabs (3 maximum), set up which properties will be shown in each tab and decide the display order of properties.

1. How many tabs do you want?

1  2  3

2. Label the tabs with something your users will understand. They will see the tab labels when making their hotel selections.

3. Check the boxes to select the hotel types for each tab. [Hotel Types Definition](#)

- You can rearrange the order properties are shown by using the hotels dropdowns on the left.  
- We recommend at least one tab that includes "Non-preferred Hotels."

Hotel Types	Tab 1 <input type="text" value="enter tab name"/>	Tab 2 <input type="text" value="enter tab name"/>	Tab 3 <input type="text" value="enter tab name"/>
1 Corporate preferred Hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Corporate preferred chains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Agency preferred Hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Agency preferred chains	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 Non-preferred Hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- **Agency Preferred Hotels:** These hotels are loaded either using a manual or automated feed by special arrangement with Deem.
- **Agency Preferred Chains:** These hotels are loaded at the Super Domain level into the Partner Dashboard | Configuration | Hotel Chain Vendor Preferences by a site administrator with super domain access.
- **Corporate Preferred Hotels:** These hotels are loaded at the site level using the Private Rates Template found at Partner Dashboard | Services tab | Travel | Private Rates by a site administrator with site access.

- **Corporate Preferred Chains:** These hotels are loaded at the site level using hotel chain preferences found within the site at Partner Dashboard | Services tab | Travel | Vendor Management | Hotel Chain Preferences by a site administrator with site access.

Select a method for shopping hotel inventory:

Allow a credit card with expiration date before hotel stay to be used as hotel guarantee?  Yes  No

Designate the mileage radius that the system should use when searching for hotels:

Designate the mileage radius that the system should use when searching for reference points:

Select default hotel search radius:

Display the following message to users when they choose a private rate hotel that can only be booked directly by the travel agency:

We're sorry, but we cannot automatically confirm your hotel when you purchase this itinerary. Your travel agency will be alerted and handle contacting the hotel directly to book your stay. Your hotel will have a system status as on request.

Select the maximum number of guests allowed per hotel room booking:

Check real-time availability of hotels?  Yes  No

Get real-time pricing for hotels?  Yes  No

Enable Trip Advisor reviews:

Trip Advisor Disclaimer:

Entries are not provided by Deem.

Allow out of policy hotel rooms to be bookable?:  Yes  No

- **Select a method for shopping hotel inventory:** Select *Use superdomain setting*, *Both GDS and Ancillary*, *GDS* or *Ancillary* from the drop down list.
- **Allow a credit card with expiration date before hotel stay to be used as hotel guarantee:** Yes or No. Set to Yes will allow the use for hotel late arrival guarantee of a credit card that has an expiration date before the anticipated hotel stay.
- **Designate the mileage radius that the system should use when searching for hotels:** Enter the number of miles away from the searched for hotel city that alternative hotel cities will be displayed. Also select the unit of measure to use when displaying the distance. It is recommended that 60 – 75 miles be used to limit the number of returned hotels.
- **Designate the mileage radius that the system should use when searching for reference points:** Enter the number of miles away from the searched for reference point that alternative reference points will be displayed. Also select the unit of measure to use when displaying the distance. It is recommended that 60 – 75 miles be used to limit the number of returned reference points.
- **Select default hotel search radius:** Select the number to use as the default search radius from the drop down list. The list will include the radius entered in **Designate the mileage radius that the system should use when searching for hotels**.
- **Display the following message to users when they choose a private rate hotel that can only be booked directly by the travel agency:** Enter in text that will be displayed to the traveler if the selected hotel can only be booked directly by the travel agency. Be sure not to include travel lingo or HTML code since this message is displayed to the traveler.
- **Check real-time availability of hotels?** Yes or No.

- **Get real-time pricing for hotels?** Yes or No.
- **Enable Trip Advisor reviews:** Select *Use superdomain setting*, Yes or No from the drop down list
- **Trip Advisor disclaimer:** Enter up to 500 characters of HTML or plain text to display at the bottom of the list of comments travelers have provided for the property. This typically would be “The comments made by travelers do not reflect the company’s views” or something similar.
- **Out of policy hotel rooms to be bookable?:** Selecting Yes makes out of policy hotel rooms selectable (they will still be called out of policy) and selecting No will not allow the selection of out of policy hotel rooms.

- **Car Shopping Display Configuration:**

- **Restrict car sizes to users?** Yes or No.
  - If Yes is selected:

- **Do not display these car sizes:** Select the car sizes to not display. Several can be selected by holding down the control key to select one at a time, or the shift key to select a range.
- **Hide the car matrix on the search results:** Select the Yes or No radio button.
- **Require form of payment for Rental Car only bookings:** Select the Yes or No radio button.
- **Restrict users from booking Hybrids:** Select the Yes or No radio button.
- **Out of policy rental cars to be bookable?:** Selecting Yes makes out of policy rental cars selectable (they will still be called out of policy) and selecting No will not allow the selection of out of policy rental cars.

- **Booking, Change and Cancellation Configuration:**

**Booking, Change and Cancellation Configuration**

Default search form to include flights:  Yes  No

Default search form to include hotel:  Yes  No

Default search form to include rental car:  Yes  No

Select the minimum time required before flight time for booking, and changing airline flights:

Select the maximum number of travelers that may be booked on any airline flights:

Display the option to add Special Handling text on the Trip Purchase page?  Yes  No

Enable user to change the Traveler Name on the Purchase page?  Yes  No

Hide the Address field from the Purchase page?:  Yes  No

Allow Single use credit card on Purchase Page?:  Yes  No

Select the system behavior that should apply when a hotel or car booking fails during the purchase process?  Create Passive Segment  Complete purchase without hotel or car

Display the following advisory text when the Trip is booked, without requested hotel(s) or car(s):

This reservation could not be confirmed by the service provider. Please call your 4 Test Travel to make this reservation.

Enable users to change the reservation # by clicking on the "Change" button.

- **Default search form to include flights:** Yes or No. Should the flight checkbox be pre-checked when the search form is presented to the traveler?
- **Default search form to include hotel:** Yes or No. Should the hotel checkbox be pre-checked when the search form is presented to the traveler?
- **Default search form to include rental car:** Yes or No. Should the rental car checkbox be pre-checked when the search form is presented to the traveler?
- **Select the minimum time required before flight time for booking and changing airline flights:** Times range from No limit to 1 day in hour increments and 1 – 5 days in day increments.
- **Select the maximum number of travelers that may be booked on any trip:** It is recommended that this be set to 1.
- **Display the option to add Special Handling text on the Trip Purchase page:** Yes or No. Setting this to Yes will allow free form text to be entered by the traveler which can be used to set queue delivery options.
- **Enable user to change the Traveler Name on the Purchase page:** Yes or No. It is recommended this be set to No, but can be used for non-profiled bookings such as for guest travelers.
- **Hide the Address field from the Purchase page:** Yes or No. Selection of “No” will display the travelers address as listed in the profile. Yes will not display the address.
- **Allow Single use credit card on Purchase Page:** Yes or No. Allow user to enter a one-time only form of payment on the Purchase Page. This card will not be saved to the user’s profile.
- **Select the system behavior that should apply when a hotel or car booking fails during the purchase process:** Create a Passive Segment or Complete purchase without hotel or car.

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**Note:** Rental car passive segments are no longer generated during booking flows as a default error response. Deem has implemented extensive retry and error handling for rental cars at purchase to avoid generating passive rental car segments.

The Display Configuration page in the dashboard will be modified in a future release to remove the word 'car' from this option.

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- **Display the following advisory text when the Trip is booked without requested hotel(s) or car(s):** Enter in text that will be displayed to the traveler if the trip is booked without the requested hotel or car. Be sure not to include travel lingo or HTML code since this message is displayed to the traveler.

The screenshot shows a configuration page with the following settings:

- Enable users to change or cancel airline flights, trains, hotels, and/or rental cars post booking?  Yes  No
- Enable users to add air to hotel and/or rental car only trips post booking?  Yes  No
- Limit online cancel to only online booked domestic trips where full fare details are available?  Yes  No ⓘ
- Automatically void airline tickets when an itinerary is cancelled?  Yes  No
- Automatically refund airline tickets when an itinerary is cancelled?  Yes  No
- Allow ticket exchanges that result in forfeiture of residual fare?  Yes  No
- Allow online changes to offline originated transactions?  Yes  No
- Allow users to Opt in/Opt out of unused ticket?  Yes  No
- Select the system behavior that should apply when a user requests to change only their return flight(s):  Advise user of possible fare increase and continue  Require user to contact agency
- Allow users to exchange a non-refundable airline ticket for a refundable ticket?  Yes  No
- Allow users to exchange a refundable airline ticket for a refundable ticket?  Yes  No
- Allow users to exchange a refundable airline ticket for a non-refundable ticket?  Yes  No
- Allow users to exchange an unused airline e-ticket only if the name on the ticket matches that of the traveler for validated tickets?  Yes  No
- Select the amount of time a selected unused airline e-ticket should be locked for re-use: 2 days ▾
- Select the method that should be used when there are multiple un-used e-tickets on the same carrier:  Use e-ticket with the nearest expiration date  Use e-ticket with the most applicable value
- Enable users to change hotel reservations that include a non-refundable deposit or are outside of the cancellation period? (applicability based on presence of GDS data):  Yes  No

- **Enable users to change or cancel airline flights, hotels, and/or rental cars post booking?** Yes or No. Selection to change or cancel air OR hotel OR rental car cannot be made. Only selection to change or cancel air AND hotel AND rental car can be made. Selecting Yes enables the storing of the unused ticket.

---

**Note:** Selecting No will hide the remaining fields in this section. Selecting Yes displays the following fields:

---

- **Enable users to add air to hotel and / or rental car only trips post booking:** Yes or No.
- **Limit online cancel to only online booked domestic trips where full fare details are available:** Yes or No.
- **Automatically void tickets when an itinerary is cancelled:** Yes or No.
- **Automatically refund tickets when an itinerary is cancelled:** Yes or No.

- **Allow ticket exchanges that result in forfeiture of residual fare:** Yes or No. If Yes is selected an additional option is available:
- **Maximum value that the fare forfeiture will be allowed during an exchange:** Enter a value.
- **Allow online changes to offline originated transactions?** Yes or No.
- **Allow users to opt out of unused ticket?** Yes or No.
- **Select the system behavior that should apply when a user requests to change only their return flight(s):** Select either *Advise user of possible fare increase and continue* or *Require user to contact agency*
- **Allow users to exchange a non-refundable ticket for a refundable ticket:** Yes or No.
- **Allow users to exchange a refundable ticket for a refundable ticket:** Yes or No.
- **Allow users to exchange a refundable ticket for a non-refundable ticket:** Yes or No.
- **Allow users to exchange an unused airline e-ticket only if the name on the ticket matches that of the traveler.** Yes or No.
- **Select the amount of time a selected unused e-ticket should be locked for re-use:** Select between 1 – 23 hours or 1 – 5 days. Recommended to be set to whatever is appropriate to the **mid-office** process.
- **Select the method that should be used when there are multiple unused e-tickets on the same carrier:** Select either *Use e-ticket with the nearest expiration date* or *Use e-ticket with the most applicable value.*
- **Enable users to change hotel reservations that include a non-refundable deposit or are outside of the cancellation period (applicability based on presence of GDS data):** Yes or No.

- **Tentative Trips Configuration:**

---

**Note:** Tentative trips can also be called “Held” trips.

---

- **Do you permit travelers to hold tentative trips?** Yes or No. If No is selected:

The screenshot shows a web form titled "Tentative Trips Configuration". The question "Do you permit travelers to hold tentative trips?" is followed by two radio buttons: "Yes" (unselected) and "No" (selected). Below the form, a "Page Messages" section is visible.

- **Do you permit travelers to hold tentative trips?** Yes or No. If Yes is selected:

The screenshot shows the "Tentative Trips Configuration" form with "Yes" selected for the first question. Additional options are visible:
 

- "What is the minimum time prior to departure required to hold a tentative trip?" with a dropdown menu set to "1 hour".
- "When a tentative trip is held, the system can remind the traveler that their booking should be purchased or cancelled. When should the system send this email reminder?" with a dropdown menu set to "after 6 hours".
- "Allow reservations to be placed on hold until:" with a dropdown menu set to "Time limit of most restrictive segment".
- "Override company name on disclaimer:" with a text input field containing "Acme Corporation".



- **What is the minimum time prior to departure required to hold a tentative trip?** Times range from 1 to 12 hours, and 24, 36, 48, 60, and 72 hours. This is typically set to 6 or 12 hours.
- **When a tentative trip is held, the system can remind the traveler that their booking should be purchased or cancelled. When should the system send this email reminder:** Choose to not send a reminder or select *After 6, 12, 24 or 48 hours*.
- **Allow reservations to be placed on hold until:** *Time limit of most restrictive segment, 24 hours or time limit of most restrictive segment, whichever is earlier, or 48 hours or time limit of most restrictive segment, whichever is earlier*
- **Override company name on disclaimer:** Enter a name other than the agency name to display on the travel disclaimer, if appropriate. This could be the client name, for example.

- **Page Messages:**

**Note:** Configuration Team can assist with these messages.

Each of these messages allows up to 4000 characters, but it is suggested a limit for each message be no more than 400 characters for easier review by the traveler.

**Page Messages**

Trip Search page:	<pre>&lt;p&gt;&lt;strong&gt;Questions or Help:&lt;/strong&gt;&lt;/p&gt;&lt;br&gt; &lt;br&gt; &lt;p&gt;For online travel support for navigational questions or if you are trying to book a trip that is</pre>
Flight search results:	<pre>&lt;p&gt;&lt;strong&gt;Helpful Tips:&lt;/strong&gt;&lt;/p&gt;&lt;br&gt;&lt;br&gt; &lt;p&gt;Hover over the gold icon for preferred vendor description.&lt;/p&gt;&lt;br&gt;&lt;br&gt; &lt;p&gt;Please book the same airline roundtrip whenever possible for best</pre>
Train search results:	
Hotel search results:	<pre>&lt;p&gt;The Rearden Commerce travel module accesses a rich database of over 87,000 properties that provide details regarding hotel amenities, photographs and even a map of how to find it! &lt;/p&gt;&lt;br&gt;&lt;br&gt;</pre>
Car rental search results:	<pre>&lt;p&gt;Hover over the gold icon for preferred vendor description.&lt;/p&gt;&lt;br&gt;&lt;br&gt; &lt;p&gt;You may change the desired pick-up location of your rental car by selecting "Change search".&lt;/p&gt;&lt;br&gt;&lt;br&gt;</pre>
Change Trip Assistant:	<pre>&lt;p&gt;If you are not allowed to &lt;strong&gt;&lt;font color="red"&gt;CHANGE&lt;/font&gt;&lt;/strong&gt; or &lt;strong&gt;&lt;font color="red"&gt;CANCEL&lt;/font&gt;&lt;/strong&gt; a portion of your trip on-line, it is because the reservation requires assistance from 4 Test Travel</pre>
Cancel Trip Assistant:	<pre>&lt;p&gt;If you are not allowed to &lt;strong&gt;&lt;font color="red"&gt;CHANGE&lt;/font&gt;&lt;/strong&gt; or &lt;strong&gt;&lt;font color="red"&gt;CANCEL&lt;/font&gt;&lt;/strong&gt; a portion of your trip on-line, it is because the reservation requires assistance from 4 Test Travel</pre>

- **Trip Search page:** Enter the HTML for a message that will display on the trip search page.
- **Flight search results:** Enter the HTML for a message that will display on the flight search results page.

- **Hotel search results:** Enter the HTML for a message that will display on the hotel search results page.
  - **Car rental search results:** Enter the HTML for a message that will display on the rental car search results page.
  - **Change Trip Assistant:** Enter the HTML for a message that will display on the change trip assistant.
  - **Cancel Trip Assistant:** Enter the HTML for a message that will display on the cancel trip assistant.
- If WebFare has been enabled, additional fields are available:
    - **WebFare Source Messages:**

---

**Note:** Configuration Team can assist with these messages.

Each of these messages allows up to 4000 characters, but it is suggested a limit for each message be no more than 400 characters for easier review by the traveler.

---

- **Provide a message that will be displayed to the user when they select a web fare option at the Air Search Results page:** Enter the HTML for a message that will display on the air search results page.
- **Provide a message that will be displayed to the user at the Terms and Conditions page:** Enter the HTML for a message that will display on the Terms and Conditions page.
- **Provide a message that will be displayed to the user at the Trip Confirmation page and the Email Notification:** Enter the HTML for a message that will display on the Trip Confirmation page and be included in the Trip Confirmation email.
- **Provide a message that will be displayed to the user at the Trip Details page:** Enter the HTML for a message that will display on the Trip Details page.

4. Click **Save** to save your changes.

### 1.1.2 Display Configuration Sets

1. Add the **List** to a **Set** as previously discussed.
2. Click the “**\_ changes not applied**” link to commit the changes. The changes made since the last time a commit was done are displayed. Click the **Commit** button to commit the changes to the database.

## 1.2 Travel Policy Management

During the last module we studied Travel Display Configuration which defines what the Deem site will look like for the user and what selections are made available to them.

Travel policy sets the guidelines within which the traveler is expected to book taking into consideration corporate travel policy. Travel policy also defines the consequences if they deviate from policy.

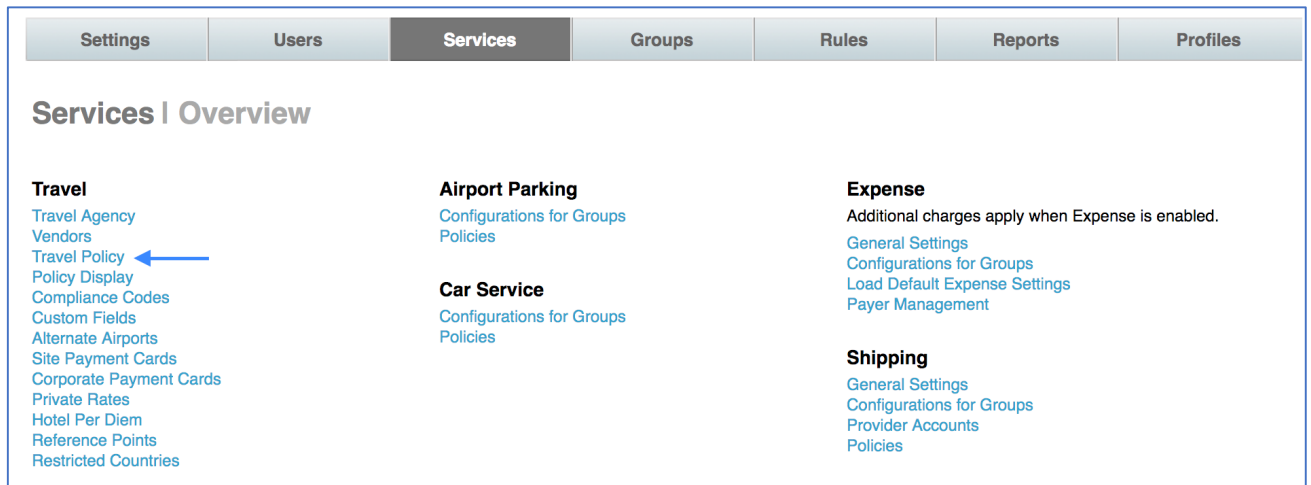
Different policies can be established for different groups; for example the VIP Group vs. Everyone Group or for Domestic Travel vs. International Travel policies. In this section we will learn how to configure these policies.

---

**Note:** When a site is cloned from a template, Travel Policies are also cloned. Most policies can remain the same as those found on the template, but some may need to be adjusted depending on the individual site’s requirements.

---

1. Click the **Services** tab.
2. The **Services | Travel** page is displayed. Click the **Travel Policy** link.



3. The **Services | Travel Policy Management** page is displayed. Click the **Policy List** link.

---

**Note:** The Policy Settings adhere to the List and Set structure.

---

Settings Users **Services** Groups Rules Reports Profiles

[Back to Travel Configuration](#)

## Services | Travel Policy Management

[Policy List](#)  
Create, Edit and Delete travel policies.

[Policy Sets](#)  
Create, Edit and Delete sets of travel policies.

4. The **Services | Policy List** page is displayed. Click **Add Travel Policy** link to add a new record, or click the name link of an existing travel policy record to edit that record.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Travel Policy Management](#)

## Services | Policy List

**Policy List**

Policy Name	Active	Last Update	
<a href="#">Default Travel Policy</a>	Yes	April 21, 2008	<a href="#">Copy</a> <a href="#">✕</a>
<a href="#">VIP Travel Policy</a>	Yes	May 20, 2008	<a href="#">Copy</a> <a href="#">✕</a>
<a href="#">Add A New Travel Policy</a>			

5. The **Services | Add** page is displayed. Complete the page.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Policy List](#)

## Services | Add

**General Settings**

Activate Policy

Policy Name:

**Flight Policy**

- **General Settings:**
  - **Activate Policy:** Select the checkbox to activate the policy.
  - **Policy Name:** Name the travel policy. This name should be easily recognizable as a specific travel policy. An example is *VIP Policy* to show that this policy is for VIP travelers or *International Policy* to show the policy is for international travelers.

**Note:** The *Display Configuration* states what classes of service the traveler will see on the Deem site while the *Travel Policy Configuration* states what the traveler is allowed to select within corporate guidelines.

- **Flight Policy:**

**Flight Policy**

Enter the maximum allowable difference between the lowest policy compliant airfare and the user's selection:

Enter the maximum allowable percentage difference between the lowest policy compliant airfare and the user's selection:  %

Choose which should be used if both percentage and currency parameters apply:  Greater or  Lesser of the two

Apply lowest policy compliant airfare to unused ticket add collect:  Yes  No

Enter the maximum allowable airfare change fee:

Enter the maximum allowable airfare cancellation fee:

Enter the minimum advance purchase time range:  Days

Select the earliest limit of the time range that will be used to evaluate policy compliance for itineraries with flights:

Select the latest limit of the time range that will be used to evaluate policy compliance for itineraries with flights:

First Class Policy

- **Enter the maximum allowable difference between the lowest policy compliant airfare and the user's selection:** Enter the fare difference threshold before the selection is marked as out of policy and the unit of measure to use for that value.
- **Enter the maximum allowable percentage between the lowest policy compliant airfare and the user's selection:** Enter the most allowable percent difference between what was returned as a compliant trip and the trip selected by the traveler.

---

**Note:** If both a maximum allowable difference and percent were entered, another question is asked; how to further handle a difference:

---

- **Choose which should be used if both percentage and currency parameters apply:** *Greater or Lesser of the two.* If both percentage and amount are used to determine policy, will policy be determined by the greater or lesser of the two? For example, if the lowest cost compliant trip is \$1000 with an allowed currency difference set to \$100 before it is flagged out of policy and a percentage difference is set to 5% or \$50 before it is flagged as out of policy – which will be within policy – the lesser (% or \$50 in this case) or the greater (amount difference or \$100 in this case)?
- **Apply lowest policy compliant airfare to unused ticket add collect:** Yes or No. Apply the new ticket additional collect amount to the original ticket's value for policy compliance.
- **Enter the maximum allowable airfare change fee / Currency:** In addition to the possible ticket price increase, what is the maximum change fee allowed and in what currency?
- **Enter the maximum allowable airfare cancellation fee / Currency:** What is the maximum cancellation fee allowed and in what currency?
- **Enter the minimum advance purchase time range: / Days:** Enter the minimum number days before departure ticket purchase is allowed. Generally set to between 7 and 14 days. The trip would be out of policy if it were booked less than 7 or 14 days before departure date.
- **Select the earliest limit of the time range that will be used to evaluate policy compliance for itineraries with flights:** Select *Same as group air-search window*, or *1 – 24 hours* in hour increments.
  - By selecting *Same as group air-search window*, the value selected in the Display Configuration question: "Select the earliest limit of the time range that will be used

to search all US domestic and Canadian airline availability based on the user's requested time" is used. Generally, *Same as group air-search window* is selected.

- By selecting *1 – 24 hours*, the setting on the Display Configuration is being overridden.
- **Select the latest limit of the time range that will be used to evaluate policy compliance for itineraries with flights:** Select *Same as group air-search window*, or *1 – 24 hours* in hour increments.
  - By selecting *Same as group air-search window*, the value selected in the Display Configuration question: "Select the latest limit of the time range that will be used to search all US domestic and Canadian airline availability based on the user's requested time" is being used. Generally, *Same as group air-search window* is selected.
  - By selecting *1 – 24 hours*, the setting on the Display Configuration will be overridden.

▪ **First Class through Premium Coach Class Policy:**

First Class Policy  
Travelers are permitted to book first class:  Yes  No

Business Class Policy  
Travelers are permitted to book business class:  Yes  No

Premium Coach Class Policy  
Travelers are permitted to book premium coach class:  Yes  No

- **Travelers are permitted to book first class:** Yes or No. If Yes was selected:

First Class Policy  
Travelers are permitted to book first class:  Yes  No

Limit first class to international flights:  Yes  No (as per the group's domestic definition)

Minimum flight time for first class: 7 hours 0 minutes

Apply minimum flight time per flight segment:  Yes  No (if no, then will apply to total flight time for connecting flights)

Minimum flight distance for first class: [ ] miles

- **Limit first class to international flights:** Will first class only be allowed if this is an international flight? Yes or No.
- **Minimum flight time for first class:** What is the length of flight time before a first class ticket would be allowed? Select the *Hours* and *Minutes* from the drop down lists.
- **Apply minimum flight time per flight segment:** Yes or No. If No was selected then will apply to total flight time for connecting flights. Most often Yes is selected.
- **Minimum flight distance for first class:** What is the flight distance before a first class ticket would be allowed? Enter the *Number* and select the *Unit of Measure* from the drop down list.

- **Business Class Policy:**

- **Travelers are permitted to book business class:** Yes or No. If Yes was selected:

**Business Class Policy**

Travelers are permitted to book business class:  Yes  No

Limit business class to international flights:  Yes  No (as per the group's domestic definition)

Minimum flight time for business class: 5 hours 0 minutes

Apply minimum flight time per flight segment:  Yes  No (if no, then will apply to total flight time for connecting flights)

Minimum flight distance for business class:  miles

- **Limit business class to international flights:** Will business class only be allowed if this is an international flight? Yes or No.
- **Minimum flight time for business class:** What is the length of flight time before a business class ticket would be allowed? Select the *Hours* and *Minutes* from the drop down lists.
- **Apply minimum flight time per flight segment:** Yes or No. If No was selected then will apply to total flight time for connecting flights. Most often Yes is selected.
- **Minimum flight distance for business class:** What is the flight distance before a business class ticket would be allowed? Enter the *Number* and select the *Unit of Measure* from the drop down list.

○ **Premium Coach Class Policy:**

- **Travelers are permitted to book premium coach class:** Yes or No. If Yes was selected:

**Premium Coach Class Policy**

Travelers are permitted to book premium coach class:  Yes  No

Limit premium coach class to international flights:  Yes  No (as per the group's domestic definition)

Minimum flight time for premium coach class: 3 hours 0 minutes

Apply minimum flight time per flight segment:  Yes  No (if no, then will apply to total flight time for connecting flights)

Minimum flight distance for premium coach class:  miles

- **Limit premium coach class to international flights:** Will premium coach class only be allowed if this is an international flight? Yes or No.
- **Minimum flight time for premium coach class:** What is the length of flight time before a premium coach class ticket would be allowed? Select the *Hours* and *Minutes* from the drop down lists.
- **Apply minimum flight time per flight segment:** Yes or No. If No was selected then will apply to total flight time for connecting flights. Most often Yes is selected.
- **Minimum flight distance for premium coach class:** What is the flight distance before a premium coach class ticket would be allowed? Enter the *Number* and select the *Unit of Measure* from the drop down list.

▪ **Cost Reduction Options:**

**Cost Reduction Options**

Must travelers always search for lowest available fare?:  Yes  No

Are connecting flights allowed when non-stops are available?:  No  
 Yes, but not required  
 Yes, required when cheaper and when journey time not significantly increased

Minimum savings required to accept connecting flights:  United States Dollar

Maximum time a connecting flight could add to a trip:  hours  minutes

Require connecting flight on same day travel:  Yes  No

Maximum connecting time required when no non-stops are available:  hours  minutes

If no flights are available within the maximum connecting time window, what is the next time window (if no flights are available, within this time window, then all flights are considered for policy evaluation)?  hours  minutes

Are double connecting flights required to reduce cost?:  Yes  No

Are interline flights required to reduce cost?:  Yes  No (e.g., DL/DL to DL/AA)

Must travelers select an airline for which there are wholly unused e-tickets?:  Yes  No

Must travelers select an alternate airport to reduce travel costs?:  Yes, any airport returned by the system.  
 Yes, only corporate defined alternate airports.  
 No

If yes, what is the minimum savings to require alternate airport:  United States Dollar

Apply policy to alternate airports for:  Departure  
 Arrival  
 Both

**Note:** During the Cost Reductions Options sections the use of **Required** and **Allowed** will be seen. When something is Required, if the traveler makes a selection other than what is stated as Required, the trip will be flagged as out of policy regardless of if the trip was the lowest cost or not. When something is Allowed, the traveler may make a selection and it will not be called out of policy.

- **Must travelers always search for lowest available fare:** Select Yes or No from the drop down list. If Yes is selected, the traveler must always search by fare. Any trip displayed as the result of another search method (refundable or non-restricted tickets) will be called out of policy. It is recommended this be set to Yes.
- **Are connecting flights allowed when non-stops are available?** Select No, Yes, but not required or Yes, required when cheaper and when journey time not significantly increased from the drop down list. Will connecting flights be allowed or required? When Yes, required when cheaper and when journey time not significantly increased is selected, the following options are displayed:

**Important Note:** If No is selected, in a market where both connecting and non-stop flights are returned, a traveler must select a non-stop regardless of savings of a connecting flight. If Yes, but not required is selected, in a market where both connecting and non-stop flights are returned, a traveler will not be called out of policy regardless of any price difference. It is recommended this be set to Yes, when cheaper and when journey time not significantly increased.

When Yes, when cheaper and when journey time not significantly increased is selected:

- **Minimum savings required to accept connecting flights:** Enter the amount of savings and select the unit of currency from the drop down list.
- **Maximum time a connecting flight could add to a trip:** Enter the allowed number of whole hours added to a trip by allowing connecting flights.



- **Require connecting flight on same day travel:** Select Yes or No from the drop down list to require connecting flights when booking travel where the requested departure and return dates are the same.
- **Maximum connecting time required when no non-stops are available:** Select the *Hours* and *Minutes* from the drop down lists.
- **If no flights are available within the maximum connecting time window, what is the next time window (if no flights are available within this time window, then all flights are considered for policy evaluation):** Select the *Hours* and *Minutes* from the drop down lists.
- **Are double connecting flights required to reduce cost?** Select Yes or No from the drop down lists.
- **Are interline flights required to reduce cost?** Select Yes or No from the drop down lists.
- **Must travelers select an airline for which there are wholly unused e-tickets:** Select Yes or No from the drop down list to select a ticket from the unused ticket database.
- **Must travelers select an alternate airport to reduce travel costs:** Select Yes, any airport returned by the system, Yes, only corporate defined alternate airports or No from the drop down list
  - If either Yes, any airport returned by the system, or Yes, only corporate defined alternate airports are selected:
    - **If yes, what is the minimum savings to require alternate airport?** Enter the amount of savings and select the unit of currency from the drop down list.
    - **Apply policy to alternate airports for:** Select the *Departure*, *Arrival*, or *Both* radio buttons.

▪ **Preferred Airlines Options:**

Preferred Airlines Options

Require selection of preferred airlines:  Yes, for all flight legs  
 Yes, for at least one flight leg  
 No

Restricted vendors, if any, are flagged as out of policy?:  Yes  No

- **Require selection of preferred airlines:** Select Yes, for all flight legs, Yes, for at least one flight leg or No from the drop down list. If Yes, for all flight legs, or Yes, for at least one flight leg was selected from the drop down list:

Preferred Airlines Options

Require selection of preferred airlines:  Yes, for all flight legs  
 Yes, for at least one flight leg  
 No

If yes, lowest required airlines preference ranking:  (higher ranks will be included)

Are travelers allowed to fly direct flights on other airlines?:  Yes  No

Are travelers allowed to fly other lower cost airlines?:  Yes  No

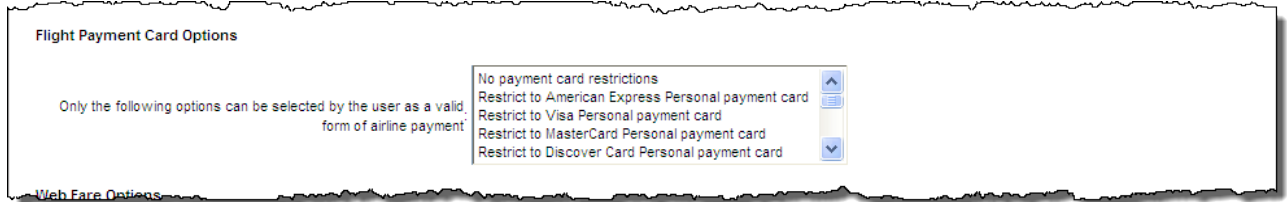
If yes, enter the minimum savings required to permit selection of other airlines:

Restricted vendors, if any, are flagged as out of policy?:  Yes  No

- **If yes, lowest required airlines preference ranking:** Select All, First, Second or Third from the drop down list. **NOTE:** First equals Most Preferred, Second equals Highly Preferred and Third equals Preferred.
- **Are travelers allowed to fly direct flights on other airlines:** Select Yes or No from the drop down list.

- **Are travelers allowed to fly other lower cost airlines:** Select Yes or No from the drop down list. (Lower cost airlines refer to non-preferred airlines.)
- If Yes was selected:
  - **If yes, enter the minimum savings required to permit selection of other airlines:** Enter the amount of savings and select the unit of currency from the drop down list.
- **Restricted vendors, if any, are flagged as out of policy:** Select Yes or No from the drop down list. Will restricted airlines marked as out of policy regardless of price, etc. be displayed?

▪ **Flight Payment Card Options:**



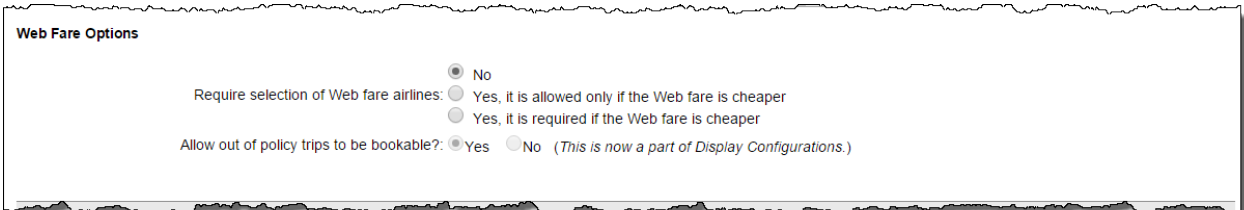
- **Only the following options can be selected by the user as a valid form of airline payment:** Select *No payment card restrictions* or select a payment card brand from the drop down list. By selecting either a Personal or Corporate card, travel using the card selected will be allowed. Holding the control key allows selection of multiple cards.

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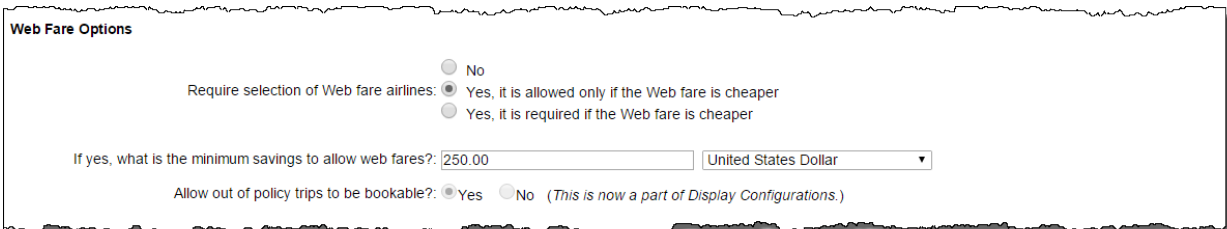
**Note:** If WebFare options are enabled on the Display Configuration, additional options are available.

---

▪ **Web Fare Options:** Web fare examples include VMI Baby, Ryan Air and Easy Jet.



- **Require select of Web Fare airlines:** Select *No*, *Yes, it is allowed only if the Web fare is cheaper* or *Yes, it is required if the Web fare is cheaper* from the drop down list.
  - If Yes, *if is allowed only if the Web fare is cheaper* was selected:
    - **If yes, what is the minimum savings to allow web fares:** Enter the amount of savings allowed and select the unit of currency from the drop down list.



- **If Yes, it is required if the Web fare is cheaper** was selected:

- **If yes, what is the minimum savings to require web fares:** Enter the amount of savings required and select the unit of currency from the drop down list.
  - **Allow out of policy trips to be bookable?** The selection made on the Display Configuration is displayed here. *No* will produce a hard stop when an out of policy flight is offered. The Select button will be grayed out and unavailable for selection.

- **Train Policy:**

- **First Class Policy Travelers are permitted to book first class:** Select *Yes* or *No* from the drop down list.
- **Business Class Policy Travelers are permitted to book business class:** Select *Yes* or *No* from the drop down list.
- **Allow out of policy trains to be bookable?** The selection made on the Display Configuration is displayed here. *No* will produce a hard stop when an out of policy rail trip is offered. The Select button will be grayed out and unavailable for selection.
- **Rental Car Policy:**

- **Require car rentals for trips with flights:** Select *Yes* or *No* from the drop down list.
- **Maximum Car Size Allowed:** Select *None*, *Compact*, *Economy*, *Full Size*, *Intermediate*, *Luxury*, *Mini*, *Premium*, or *Standard* from the drop down list.

---

**Note:** A default car size can be set on the user profile but what is allowed within policy is defined here. If no car size is set on the user profile, the default value on the user profile is *Intermediate*.

---

- **Maximum daily Rental Car rate allowed:** Enter the maximum amount for a daily car rental charge if appropriate and select a currency from the drop down list.

---

**Note:** A weekly rate will be divided by 7 to compare the rate to the maximum allowed daily rate.

---

- **Require selection of preferred car vendor:** Select either the Yes or No radio button to require the selection of a preferred car vendor or not.
- **Restricted vendors, if any, are flagged as out of policy?** Select Yes or No from the drop down list to flag a restricted vendor as out of policy or not.
- **Out of policy car types:** Select and appropriate car type including 2-3 Door, 2/4 Door, 4-5 Door, Wagon / Estate, Passenger Van, Sport, Coupe, SUV, Crossover, Monospace, Roadster, Pickup Regular Car, Pickup Extended Cab, or Convertible from the drop down list to flag that car type as out of policy.
- **Mark hybrids as out of policy:** Select Yes or No from the drop down list to flag a hybrids as out of policy or not.
- **Allow out of policy rental cars to be bookable?** The selection made on the Display Configuration is displayed here. No will produce a hard stop when an out of policy rental car is offered. The Select button will be grayed out and unavailable for selection.

▪ **Hotel Policy:**

The screenshot shows the 'Hotel Policy' configuration form. It includes several radio button options: 'Require hotel reservations for all overnight trips' (Yes/No), 'Require user to select properties with private rates' (Yes/No), 'Require user to select properties with preferred hotel chains' (Yes/No), 'For private rate hotels, limit room rate to private rate rooms only' (Yes/No), and 'Limit room price to company per diem, if available' (Yes/No). There is a text input field for 'Maximum Room Rate when company per diem is not available or available but not enforced' with the value '200.00' and a dropdown for 'United States Dollar'. A dropdown menu is open for 'Select one or more restricted room types', showing options: 'No Restriction', 'Do not permit Suites', 'Do not permit Superior rooms', 'Do not permit King rooms', and 'Do not permit Queen rooms'. At the bottom, there are radio buttons for 'Restricted vendors, if any, are flagged as out of policy?' (Yes/No) and 'Allow out of policy rooms to be bookable?' (Yes/No) with a note '(This is now a part of Display Configurations.)'.

- **Require hotel reservations for all overnight trips:** Select Yes or No from the drop down list.
- **Require user to select properties with private rates:** Select Yes or No from the drop down list. Private rate hotels are specific properties where discounted rates have been established with that one, specific property and will be listed above any Preferred Hotel Chain on the results page. Private rates can be uploaded into the Partner Dashboard or entered using the Private Rates link found under Services | Travel.
- **Require user to select properties with preferred hotel chains:** Select Yes or No from the drop down list. Preferred hotels are entered in the Preferred Vendor section of the Partner Dashboard. Preferred hotels are ranked Most Preferred, Highly Preferred and Preferred and displayed to the traveler in that order. They would be displayed below Private Rate properties on the results page.
- **For private rate hotels, limit room rate to private rate rooms only:** Select Yes or No from the drop down list. If a different, non-private rate type of room is available (double for example), will the private rate room in the private rate hotel be allowed. By selecting Yes,

if no rooms with a private rate are available, any choice at the hotel will be out of policy. By selecting *No*, any room would be considered within policy.

- If *Yes* is selected, **If private rate rooms are not available, allow room rates up to per diem** field is displayed.

For private rate hotels, limit room rate to private rate rooms only:  Yes  No

If private rate rooms are not available, allow room rates up to per diem:

Limit room price to company per diem, if available:

Maximum Room Rate when company per diem is not available or available but not enforced:

- **Limit room price to company per diem, if available:** Select *Yes* or *No* from the drop down list. Company per diem room prices are defined BY CITY on the Travel tab under the *Hotel Per Diem Editor* link. By selecting *Yes*, the traveler will be called out of policy if the selected rate is higher than the per diem as defined in the *Hotel Per Diem* link.
- **Maximum Room Rate when company per diem is not available or available but not enforced:** Enter the room rate and select a currency from the drop down list when the per diem is not available or is not enforced by the question above.

---

**Note:** If *No* was selected above in *Limit room price to company per diem, if available*, the rule is considered to be not enforced.

---

- **Select one or more restricted room types:** Select *No Restrictions*, *Do not permit Suites*, *Do not permit Superior rooms*, *Do not permit King rooms*, *Do not permit Queen rooms*, or *Do not permit double rooms* from the drop down list. Be especially careful when limiting the room type – In all suite type properties, the room may be considered out of policy when in fact it may not be.
- **Restricted vendors, if any, are flagged as out of policy?** Select *Yes* or *No* from the drop down list.
- **Allow out of policy hotels to be bookable?** The selection made on the Display Configuration is displayed here. *No* will produce a hard stop when an out of policy hotel is offered. The Select button will be grayed out and unavailable for selection.
- **Itinerary Parameters (optional):** Markets can be restricted by date, city and airport.

**Itinerary Parameters (optional)**

Select the start and end dates to which this policy applies:

Start Date:  -  -

End Date:  -  -

Enter one or more airport code separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries originating from the entered/selected locations.

From Location:  by airport codes  by states  by countries  anywhere

Enter one or more airport code separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries terminating in the entered/selected locations.

To Location:  by airport codes  by states  by countries  anywhere

Bi-Directional:  Yes  No

Enter one or more airport code separated by semicolons or select one or more state or country to which this policy will be applied.

Through Location:  by airport codes  by states  by countries  anywhere

**Policy Message**

**Note:** International flight policy or travel to a convention can be configured in the Itinerary Parameters section by selecting originating or terminating countries from the drop down lists.

- **Select the start and end dates to which this policy applies:** Select the *Start* and *End* dates from the drop down lists if the policy will not be put in place upon saving of the record or will end within a time period.
- **Enter one or more airport codes separated by semicolons or select one or more state or country to which this policy will be applied.** The policy will apply to all itineraries originating from the entered / selected locations: Select the *From Location: by airport codes, by states, by countries* or *anywhere* radio buttons and then enter the airport code.
  - If *by airport codes* was selected, enter the airport codes separated by semi-colons

Enter one or more airport code separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries originating from the entered/selected locations.

From Location:  by airport codes  by states  by countries  anywhere

[Airport Code](#)

- If *by states* was selected, select the state(s) from the drop down list

Enter one or more airport code separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries originating from the entered/selected locations.

From Location:  by airport codes  by states  by countries  anywhere

- Alaska
- Alabama
- Arkansas
- Arizona
- California

- If *by countries* was selected, select the state(s) from the drop down list

Enter one or more airport code separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries originating from the entered/selected locations.

From Location:  by airport codes  by states  by countries  anywhere

Afghanistan	▲
Albania	▢
Algeria	▢
American Samoa	▢
Andorra	▼

- If *anywhere* was selected, no additional selections are needed.
- **Enter one or more airport codes separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries terminating in the entered / selected locations:** Select the *To Location: by airport codes, by states, by countries or anywhere* radio buttons and then enter the airport code.
  - If *by airport codes* was selected, enter the airport codes separated by semi-colons, similar to From Location above.
  - If *by states* was selected, select the state(s) from the drop down list similar to From Location above.
  - If *by countries* was selected, select the state(s) from the drop down list similar to From Location above.
  - If *anywhere* was selected, no additional selections are needed.
- **Bi-directional:** Select Yes or No from the drop down list.
- **Enter one or more airport codes separated by semicolons or select one or more state or country to which this policy will be applied.** Select the *Through Location: by airport codes, by states, by countries or anywhere* radio buttons and then enter the airport code.
  - If *by airport codes* was selected, enter the airport codes separated by semi-colons similar to From Location above.
  - If *by states* was selected, select the state(s) from the drop down list similar to From Location above.
  - If *by countries* was selected, select the state(s) from the drop down list similar to From Location above.
  - If *anywhere* was selected, no additional selections are needed.

- **Policy Message:**

**Note:** These messages will clone from the site template and may only need modification.

- **Non Compliant message displayed to the traveler:** Enter exact text to be displayed to the non compliant traveler on the travel page. Be sure to not use travel lingo or HTML tags.
- **Non Compliant message displayed on confirmation emails:** Enter exact text to be included in the email to the non compliant traveler. Be sure to not use travel lingo or HTML tags.
- **Non Compliant message displayed to the travel authorizer:** Currently not in use.
- **Pre-trip authorization message displayed to the traveler:** Currently not in use.
- **Pre-trip authorization message displayed to the travel authorizer:** Currently not in use.

- **Policy Behavior:**

- **Select a system behavior for non-compliant trips:** Select *Collect compliance information only*, *Require user to explain non-compliant trip*, *Require user to validate pre-approval for non-compliant trip*, *Require user to request permission for non-compliant trip*, or *Require user to reselect compliant trip* from the drop down list.
  - If *Collect compliance information only* is selected, the traveler will not be informed their selections are out of policy, but the selection will be collected and be made available for reports.



- *Require user to reselect compliant trip* will result in a hard stop and not permit the traveler to book their selections. They must return to the search page and begin again.
- *Require user to explain non-compliant trip* is used most often. If selected: A list of *Compliance Codes* would be displayed for selection and

**Policy Behavior**

Select a system behavior for non-compliant trips:

Require user to provide purpose of trip?:  Yes  No

**Host Agency**

- **Require user to provide purpose of trip?** Select Yes or No from the drop down list. If Yes is selected:  
**Label for Purpose of Trip Field:** Enter the text to be displayed above the Purpose of Trip field.

**Policy Behavior**

Select a system behavior for non-compliant trips:

Require user to provide purpose of trip?:  Yes  No

Label for Purpose of Trip Field:

**Host A**

**Note:** Require user to validate pre-approval for non-compliant trip and Require user to request permission for non-compliant trip are not currently used.

- **Host Agency:**

**Host Agency**

Enter the pseudo city code where a non-compliant booking will be queued

Pseudo city code:  (Optional: will override agency settings)

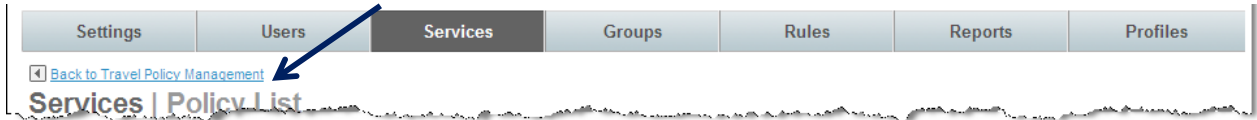
Enter the queue designation where a non-compliant booking will be queued

Queue:  (Optional: will override agency settings)

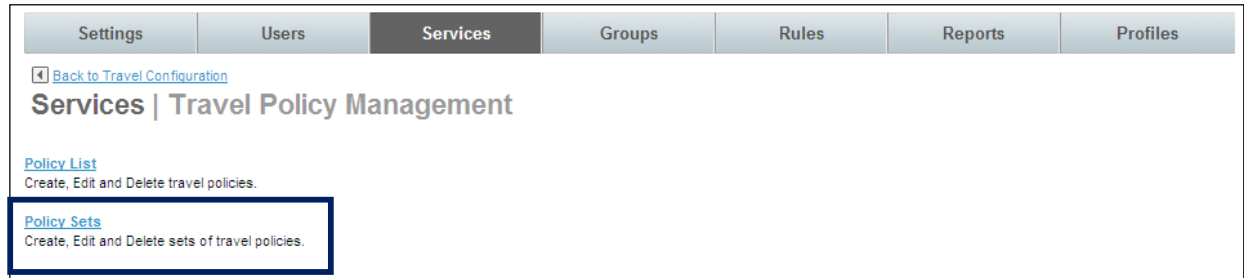
**Note:** Typically Queue Delivery Options is used, not Host Agency.

- **Enter the pseudo city code where a non-compliant booking will be queued.** Enter the pseudo city code if the agency configuration PCC will not be used. The booking will not fall into the default pseudo city code queue.
- **Enter the queue designation where a non-compliant booking will be queued.** Enter the queue if the agency configuration queue will not be used. The booking will not fall into the default pseudo city code queue.

- Click **Save** to save the travel policy. The **Service | Policy List** page is redisplayed. Click the **Back to Travel Policy Management** link.



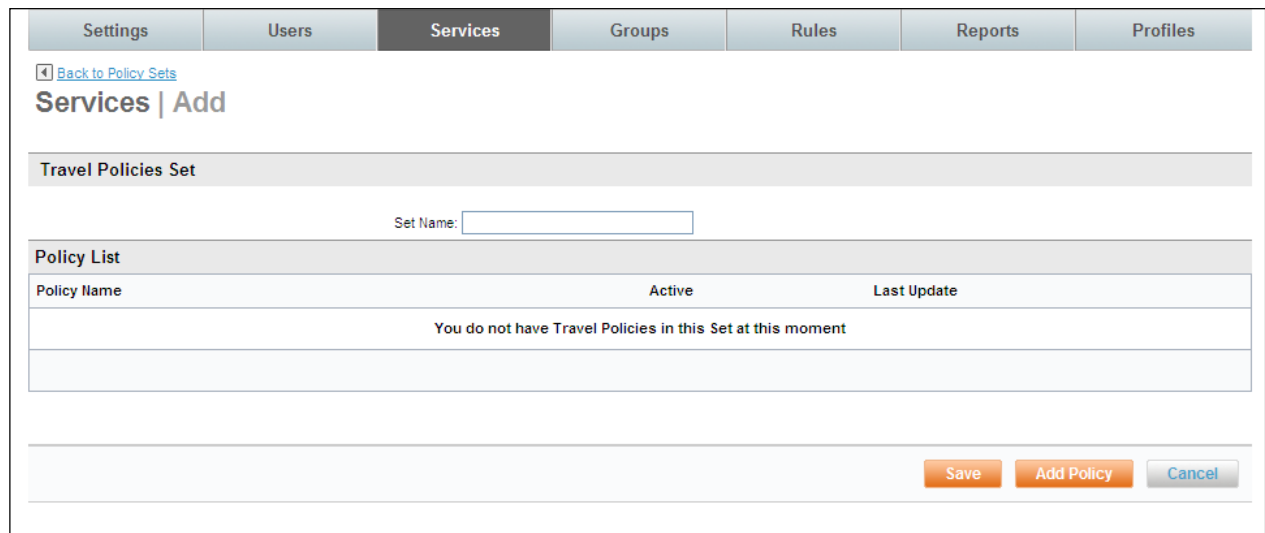
- The **Services | Travel Policy Management** page is displayed. To add the new Travel Policy to a Set, click **Policy Sets** link.



- The **Services | Policy Sets** page is displayed. Click the **Add A New Travel Policy Set** link or click the link below an existing set to add to or view it.



- The **Travel Policy Set** page is displayed.



- **Set Name:** Name the Travel Policy Set. This name should be easily recognizable as a specific Travel Policy configuration. An example is *VIP Travel Policy Set* to show that this set is for VIP travelers.

10. Click the **Add Policy** button. The **Services | Search & Add Policy To Set** page is displayed.

Select One	Policy Name	Active	Last Update
<input type="radio"/>	Default Travel Policy	Yes	June 10, 2009
<input checked="" type="radio"/>	VIP Travel Policy	Yes	May 20, 2008

11. Select the radio button beside the list name of the policy to add it to the set.
12. Click **OK**. Only one policy list can be added to the set to avoid policy conflicts. The **Services | Add** page is redisplayed.
13. Click **Save** to save the travel policies in the set.
14. Click the “**\_ changes not applied**” link to view changes not committed.
15. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.

### 1.3 Compliance Codes

*Compliance Codes* are displayed to the user for selection when their travel plans are out of policy. Generally, the ticketing travel agency provides codes to Deem consistent with what is used for agency bookings. The code is loaded into the PNR string and is available for reporting by the agency.

Each element of a trip will display the associated list of *Compliance Codes* for out of policy travel. At least one compliance code for each element must be loaded. If the agency does not use an element – Train, for example – a fictitious compliance code must be added for Train.

---

**Note:** When a site is cloned from a template, *Compliance Codes* are also cloned. Most codes can remain the same as those found on the template, but some may need to be adjusted depending on the individual site’s requirements.

---

1. Click the **Services** tab.

- The **Services | Travel** page is displayed. Click the **Compliance Codes** link.

**Settings** | **Users** | **Services** | **Groups** | **Rules** | **Reports** | **Profiles**

### Services | Overview

- Travel**
  - Travel Agency
  - Vendors
  - Travel Policy
  - Policy Display
  - Compliance Codes** ←
  - Custom Fields
  - Alternate Airports
  - Site Payment Cards
  - Corporate Payment Cards
  - Private Rates
  - Hotel Per Diem
  - Reference Points
  - Restricted Countries
- Airport Parking**
  - Configurations for Groups
  - Policies
- Car Service**
  - Configurations for Groups
  - Policies
- Expense**
  - Additional charges apply when Expense is enabled.
  - General Settings
  - Configurations for Groups
  - Load Default Expense Settings
  - Payer Management
- Shipping**
  - General Settings
  - Configurations for Groups
  - Provider Accounts
  - Policies

- The **Services | Compliance Codes Management** page is displayed. Click the **Compliance Codes List** link.

**Note:** The *Compliance Codes* adhere to the List and Set structure.

**Settings** | **Users** | **Services** | **Groups** | **Rules** | **Reports** | **Profiles**

[Back to Travel Configuration](#)

### Services | Compliance Codes Management

- Compliance Codes List**  
Create and Edit travel compliance codes.
- Compliance Codes Sets**  
Create, Edit and Delete sets of travel compliance codes.

- The **Services | Compliance Codes List** page is displayed. Click the **Add A New Compliance Code** link to add a new code, or click an existing code record to edit that record.

**Note:** One code for each type is required. If one type is not used, create one named “dummy” or something similar. One of each type is needed to save a travel rule.

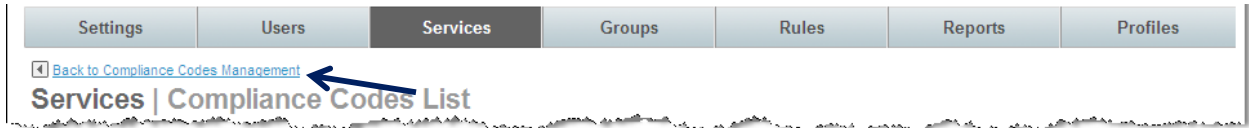
Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Compliance Codes Management</a>						
<b>Services   Compliance Codes List</b>						
<b>Compliance Codes List</b>						
Code Name	Type	Active	Last Update			
Z	Airline	Yes	April 22, 2008	<a href="#">Copy</a>	<a href="#">✖</a>	
xx	Charge Card	Yes	August 21, 2007	<a href="#">Copy</a>	<a href="#">✖</a>	
X	Airline	Yes	August 21, 2007	<a href="#">Copy</a>	<a href="#">✖</a>	
NO	Hotel	Yes	August 21, 2007	<a href="#">Copy</a>	<a href="#">✖</a>	
1	Car Rental	Yes	August 21, 2007	<a href="#">Copy</a>	<a href="#">✖</a>	
A	Airline	Yes	August 21, 2007	<a href="#">Copy</a>	<a href="#">✖</a>	
<a href="#">Add A New Compliance Code</a>						

5. The **Services | Add** page is displayed. Complete the page.

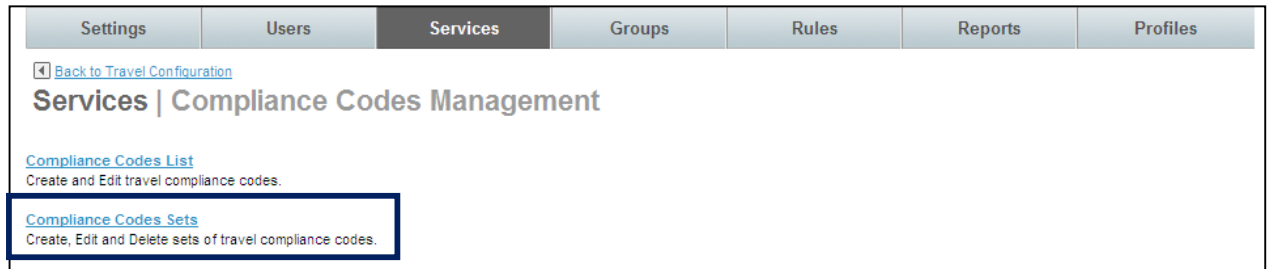
Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Compliance Codes List</a>						
<b>Services   Add</b>						
<b>Compliance Codes for Policy Handling</b>						
<input checked="" type="checkbox"/> Activate Code						
Code: <input type="text" value="Train"/>						
Display Reason Text: <input type="text" value="Selected Business Class"/> (Max 100 characters)						
Type: <input type="text" value="Train"/>						
<input type="button" value="Save"/> <input type="button" value="Cancel"/>						

- **Compliance Codes for Policy Handling:**
  - **Activate Code:** Select the checkbox to activate the code
  - **Code:** Enter a code name. The code can be alphanumeric but may not contain special characters. This code is placed in the PNR string and is not displayed to the traveler. A code can be used multiple times as long as the Type for each is different.
  - **Display Reason Text:** Enter easily understandable text to be displayed to the user for selection when the travel plans are out of policy. This text has a limit of 100 characters and should not contain HTML tags or industry lingo.
  - **Type:** Select Airline, Car Rental, Payment Card, Hotel or Train from the drop down list.

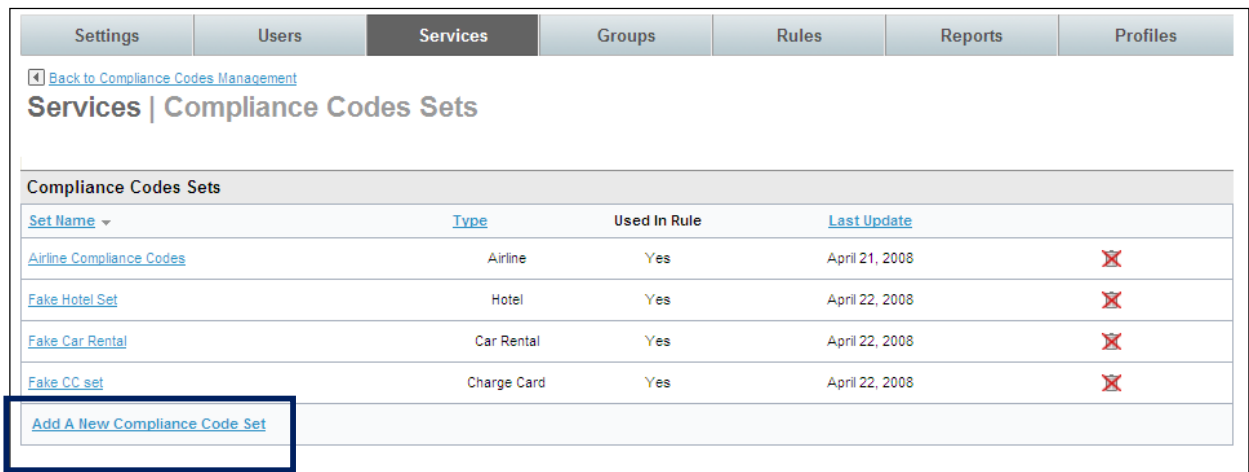
- Click the **Save** to save the code. The **Services | Compliance Codes List** page is redisplayed. Click **Back to Compliance Codes Management** link.



- The **Services | Compliance Codes Management** page is redisplayed. Click the **Compliance Codes Sets** link to add the Compliance Code list item to a set.



- The **Services | Compliance Codes Set** page is displayed. Click the **Add A New Compliance Code Set** link to add a new set, or click an existing set record to edit that record.



**Note:** One code for each type is required. If one type is not used, create one named “dummy” or something similar. One of each type is needed to save a travel rule.

9. The **Services | Add** page is displayed. Complete the page:

Code Name	Type	Active	Last Update
You do not have Compliance Codes in this Set at this moment			

- **Set Name:** Name the Compliance Code Set. This name should be easily recognizable as a specific Compliance Code configuration. An example is *Airline Compliance Code Set* to show that this one is for Airline Compliance Codes.
- **Type:** Select *Airline, Car Rental, Payment Card, Hotel or Train* from the drop down list,

10. Click the **Add Code** button. The **Services | Add Code To Set** page is displayed.

Select One	Code Name	Active	Last Update
<input type="radio"/>	Train	Yes	June 10, 2009

11. Select the radio button beside the **Compliance Code List** name to add it to the set.
12. Click **OK** if there is only one code to add, or click the **OK & Add Another** if others are needed to add to the set. The **Services | Add** page is redisplayed.
13. Click the **Save** button to save the new Compliance Code Set and apply your changes by clicking the “**\_ changes not applied**” link to commit the changes.
14. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.

## 1.4 Private Rates

Private Rates are discounted rates negotiated by the corporate client or the travel agency. All vendor types (air, car, and / or hotel) may offer private rates and have varying terms for compliance. Private rate elements will be placed at the top of the list when search results are displayed.

This page is needed infrequently. When needed, it defines individual rate codes that have been issued, but are not being properly displayed in the GDS. Enter a ticket if the need arises for this configuration.

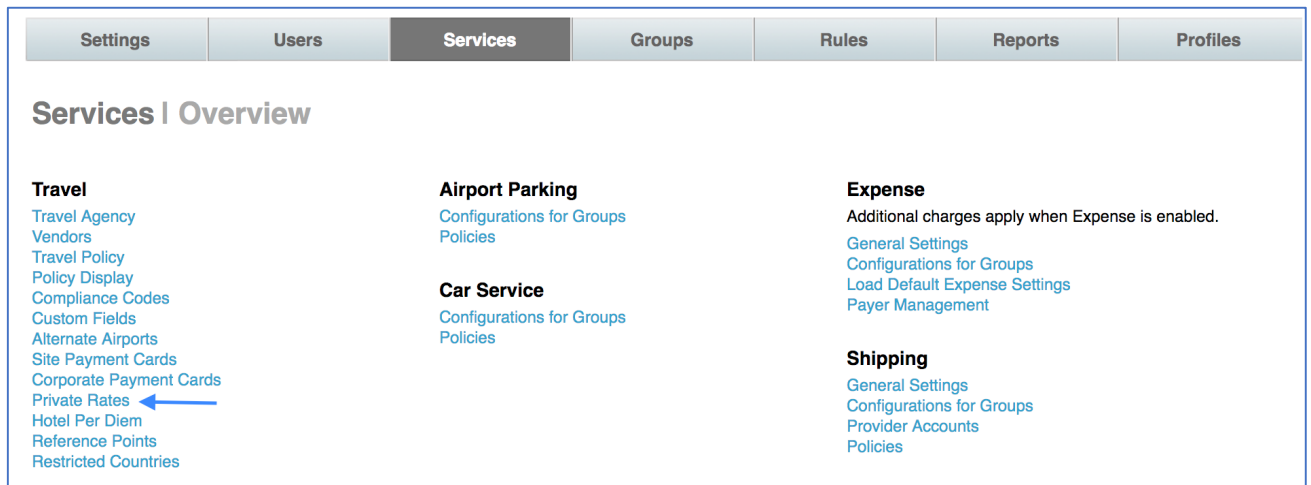
Establishing Private Rates overrides settings found on the Agency Configuration and are mainly used to establish a rate code different from Agency Configuration pricing set in the GDS with that code. If several airlines use the same rate code, enter the code on the Agency Configuration.

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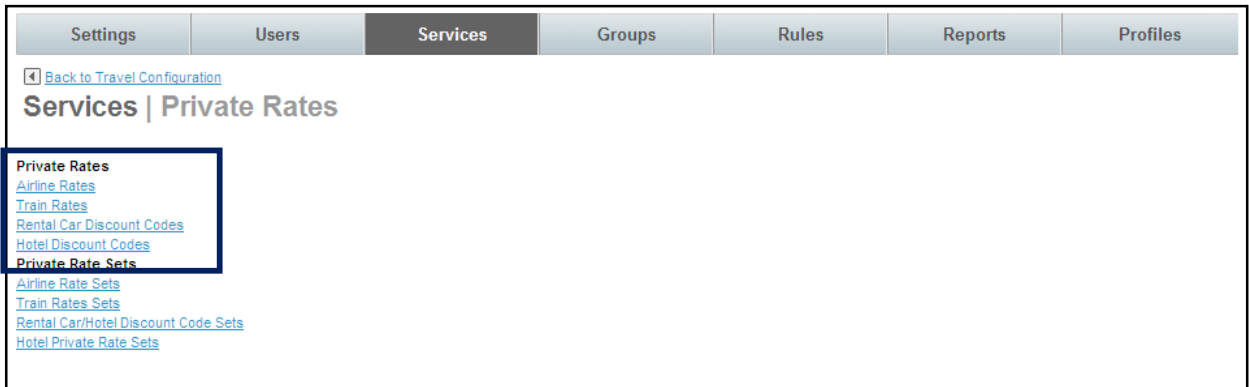
**Note:** When a site is cloned from a template, Private Rates are cloned too. Most Private Rates can remain the same as those found on the template, but some may need to be adjusted depending on the individual site's requirements.

---

1. Click the **Services** tab.
2. The **Services | Travel** page is displayed. Click the **Private Rates** link.



3. The **Services | Private Rates** page is displayed. Click the **Airlines Rates Private Rates** link.



### 1.4.1 Private Rate List Items

---

**Note:** The *Private Rates* adhere to the List and Set structure.

---



### 1.4.1.1 Airline Private Rates

1. The **Services | Airline Rates** page is displayed. Click the **Add Private Rates** link to add a new private rate, or click an existing private rate record to edit that record.

Code Name	Submission Date	Active	Copy	
Test Rate	August 21, 2007	Yes	Copy	

- **Airline Private Rates:** Airline Private Rate records are generally configured to include only the following information. This allows the GDS to perform the pricing routine.
  - **General Settings:**
    - Selected *Activate this private rate* check box
    - Private Rate Name
    - Selected *Apply this private rate on discounted itineraries* check box
    - Airline Name(s)
    - Selected *Use this rate code instead of the rate code in agency configuration* checkbox
    - GDS negotiated rate code
    - *Passenger Type* may also be required

General Settings

Activate this private rate

Private Rate Name:

Enter the effective date range for this rate record:

Start Date: - - -

End Date: - - -

Apply this private rate on discounted itineraries

Airline Private Rate Parameters

Select an airline to apply this private rate:

Select one or more airlines whose fares are combinable with this discount:

- **Activate the private rate:** Select the checkbox to activate the private rate.
- **Private Rate Name:** Name the airline private rate to help recognize the market to which it applies.
- **Airline Private Rate Parameters:**

- **Select an airline to apply this private rate:** Select the airlines from the drop down list. Only one airline may be selected.

Private Rate Booking and Ticketing Parameters

Enter GDS negotiated rate code:  Use this rate code instead of the rate code in agency configuration

Rate code: ABC

Enter GDS passenger type:

Save Cancel

- o **Private Rate Booking and Ticketing Parameters:**
  - **Enter GDS negotiated rate code:**
    - Select the **Use this rate code instead of the rate code in agency configuration** checkbox to select this rate.
    - **Rate Code:** Enter the rate code provided by GDS for this private rate.
  - **Enter the GDS passenger type:**
    - **Passenger Type:** This code may also be needed for the pricing to be returned correctly by GDS.

2. Click the **Save** to save the new **Airline Private Rate**.

#### 1.4.1.2 Train Private Rates

- **Train Private Rates:** Train Private Rate records are generally configured to include special rates established for train travel.
  - o **General Settings:**

Settings	Users	Services	Groups	Rules	Reports	Profiles
----------	-------	----------	--------	-------	---------	----------

[Back to Train Rates](#)

## Services | Add

---

**General Settings**

Activate this private rate

Private Rate Name:

Enter the effective date range for this rate record.

Start Date:     (optional)

End Date:     (optional)

---

**Train Discount Codes**

Select a train carrier:

Discount Code:

Enter Message to display to users describing discount to be applied at time of purchase.  
This will be displayed on review pages

- **Activate the private rate:** Select the checkbox to activate the private rate.
- **Private Rate Name:** Name the airline private rate to help recognize the market to which it applies.
- **Start Date:** Select the *Month, Day* and *Year* from the drop down list or click the calendar and make the selection on the calendar if the private rate will not take effect upon the save of the record.
- **End Date:** Select the *Month, Day* and *Year* from the drop down list or click the calendar and make the selection on the calendar if the private rate has an anticipated end date.
- o **Train Discount Codes:**
  - **Select a train carrier:** Select the train carrier from the drop down list. Carriers available are Amtrak, Deutsche Bahn, Eurostar, Thalys, and VIA Rail Canada.
  - **Discount Code:** Enter the train discount code.
  - Enter Message to display to users describing discount to be applied at time of purchase. This will be displayed on review pages. Enter a message to display on purchase review page.
- Click the **Save** to save the new Train Private Rate.

### 1.4.1.3 Car Rental Discount Codes

- **Car Rental Discount Codes:**

---

**Note:** For Car Rental companies to appear within the trip search results Car Rental Discount Code records must be entered regardless of if there is a real discount in place. Name the code “Dummy Car Rental Discount”.

---

○ **General Settings:**

Settings
Users
Services
Groups
Rules
Reports
Profiles

[Back to Rental Car Discount Codes](#)

## Services | Edit

**General Settings**

Discount Code Name:

Activate this private rate

**Rental Car Discount Code**

Select a car rental company:  ▼

Request rates that are lower, if available:  Yes  No (i.e. use or don't use RC-BEST)

Allow cars with guarantee:  Yes  No

Allow Non-Corporate Rates to be offered?  Yes  No  
Note: Turning this to no, will limit the result set to only car types and sizes that have a corporate rate identifier. If no cars are available for a given location, only then will non-corporate rates be offered.

Only offer this vendor when others are sold out:  Yes  No  
(only for airport searches)

Override user's id with direct bill number?:  Yes  No

Enter unique GDS format required for direct bill (optional):  Ex. GCCZL

**Location Preferences**

Apply globally (except where overridden by locale) **Corporate Discount Number:**  **Override rate code:**  **Direct bill number:**

[Add a locale](#)

- **Discount Code Name:** Name the discount code to help recognize the market to which it applies.
- **Activate the private rate:** Select the checkbox to activate the private rate.
- **Rental Car Discount Code:**
  - **Select a car rental company:** Select the car rental company from the drop down list.
  - **Request rates that are lower, if available:** Select the Yes or No radio button to request lower rates if available.
  - **Allow cars with guarantee:** Select the Yes or No radio button to allow cars that require guarantees.
  - **Allow Non-Compliant Rates to be offered?:** Select the Yes or No radio button to allow cars that are non-compliant to company policy to be displayed.
  - **Only offer this vendor when others are sold out:** Select the Yes or No radio button to only offer this vendor when others are sold out. This is only available for airport searches.
  - **Override user's id with direct bill number?:** Select the Yes or No radio button to override the user's id with the direct bill number.

- **Enter unique GDS format required for direct bill (optional):** Enter the information as it is provided by the car rental company.
  - **Location Preferences:**
    - **Apply globally (except where overridden by locale)** Enter the following fields if appropriate:
      - **Corporate Discount Number:** Enter the corporate discount number received from the car rental vendor
      - **Override rate code:** Enter the override rate code received from the rental car vendor
      - **Direct bill number:** Enter the direct bill number received from the rental car vendor
    - **Add a locale:** Select this link to select specific locations for use of this discount code.
      - **Apply By Locale:**

If *by airport codes* was selected, enter the airport codes allowed to use this discount code separated by semi-colons. An example: *SFO;IDE;FLL*.

If *by states* was selected, select the state(s) from the drop down list. Select more than one by holding down the control key while making selections.

If *by countries* was selected, select the state(s) from the drop down list. Select more than one by holding down the control key while making selections.
1. Click the **Save** button to save the new private rate / discount code. The **Services | Code** page is redisplayed. Click the **Back to Private Rates** link to return to the **Services | Private Rates** page.
  2. Click the **Private Rate Sets** link to add the **Private Rate / Discount Code** list to a set. Select the appropriate Private Rate type's link.

#### 1.4.1.4 Hotel Discount Codes

- **Hotel Discount Codes:**

○ **General Settings:**

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Hotel Discount Codes</a>						
<h2>Services   Edit</h2>						
<h3>General Settings</h3>						
Discount Code Name: <input type="text" value="Hotel Rate Codes"/>						
<input checked="" type="checkbox"/> Activate this private rate						
<h3>Hotel Discount Codes</h3>						
Enter up to three comma separated GDS corporate rate ID's to request discounted room rate: <input type="text"/>						
Limit the display of hotel room rates to those whose rate descriptions match any of the following comma separated key words or phrases: <input type="text"/>						
Remove hotel room rates from the display if the rate description matches any of the following comma separated key words or phrases: <input type="text" value="Government, Gov, State, Federal, no refund"/>						
Flag hotel room rates as preferred rate in the display if the rate description matches any of the following comma separated key words or phrases: <input type="text"/>						
Enter up to 15 character label that will be shown next to preferred rates: <input type="text"/>						
Limit rate match to: <input type="text" value="Preferred Hotels and Chains"/>						
Allow non-preferred rates to display if the rate is less than the lowest preferred rate: <input type="radio"/> Yes <input checked="" type="radio"/> No						
Perform rate and keyword match at: <input type="text" value="Both Site &amp; Partner"/>						
Show non-preferred rates: <input type="text" value="In line with preferred rates"/>						
Remove Preferred flag when preferred rate is unavailable: <input type="radio"/> Yes <input checked="" type="radio"/> No						
Request specific hotel rate type, if available: (i.e. use or don't use GOV) <input type="radio"/> Yes <input checked="" type="radio"/> No						
Enter only one valid rate type: (i.e. use GOV) <input type="text"/>						

- **Activate the private rate:** Select the checkbox to activate the private rate.
- **Discount Code Name:** Name the discount code to help recognize the market to which it applies.

○ **Hotel Discount Codes:**

**Note:** Due to GDS restrictions, generally only one hotel list will be entered. Worldspan, Sabre and Apollo limit the number of hotel discount codes to 3. Entering more than the allowed number of discount code lists or an invalid discount code may result in issues with hotel availability search results. If availability is in question, this area may be configured incorrectly.

- **Enter one or more comma separated GDS corporate rate ID's to request discounted room rate:** Enter the GDS provided corporate ID's that can request the discounted rates. NOTE: This field requires commas between entries.
- **Limit the display of hotel room rates to those whose rate descriptions match any of the following comma separated key words or phrases:** Display only hotels whose rate

descriptions include the key words entered. Examples: *Government* or *Gov*, *AAA*, *Travel Agency*

---

**Note:** Add any additional hotel rate descriptions that may return from the GDS if appropriate.

---

- **Remove hotel room rates from the display if the rate description matches any of the following comma separated key words or phrases:** Do not display only hotels whose rate descriptions include the key words entered. Examples: *Government* or *Gov*, *AAA*, *Travel Agency*

---

**Note:** Add any additional hotel rate descriptions that may return from the GDS if appropriate.

---

- **Enter up to 15 character label that will be shown next to preferred rates:** Enter a tip or hint to indicate to the traveler this is a preferred property.
- **Limit rate match to:** Drop down list includes *Preferred Hotels and Chains*, *Preferred Hotels – Defined Rate and Chains*, *Preferred Hotels – Defined Rate*, *Preferred Hotels Any Rate* or *Preferred Chains Only*.
- **Allow non-preferred rates to display if the rate is less than the lowest preferred rate:** Select *Yes* or *No*.
- **Perform rate and keyword match at:** Select *Both site and Partner*, *Site* or *Partner*.
- **Show non-preferred rates:** Select *In line with preferred rates*, *Only if preferred rates unavailable*, or *Never show non-preferred rates*.
- **Remove Preferred flag when preferred rate is unavailable:** Select *Yes* or *No*.
- **Request specific hotel rate type, if available:** Select *Yes* or *No*.
- **Enter only one valid rate type:** Enter the rate type. Examples: *GOV*, *G*.

---

**Note:** This code may differ by GDS. If no rates are returned, the code may be incorrect for that GDS.

---

- **Select a hotel chain and enter your corporate discount number for the chain to book discounted room rates:**
    - Click **Add another discount code:** to select and add hotel chain names for the drop down list.
    - Enter the **Discount Number** provided by the hotel chain to allow the discount's use.
1. Click the **Save** to save the private rate / discount code. The **Services | Code** page is redisplayed. Click the **Back to Private Rates** link to return to the **Services | Private Rates** page.
  2. Click the **Private Rate Sets** link to add the **Private Rate / Discount Code** list to a set. Select the appropriate Private Rate type's link.

## 1.4.2 Private Rate Sets

Airline and Train Private Rate Sets are processed using the same steps.

### 1.4.2.1 Airline and Train Private Rate Sets

- **Airline (Train) Private Rate Sets:**

Set Name	Used In Rule
<a href="#">A20</a>	Yes

[Add A New Airline Rate](#)

- Click the **Add A New Airline (Train) Rate** link to add a new set, or click an existing set record to edit that record. The **Services | Add** page is displayed.

Private Rate Set Name:

Code Name	Submission Date	Active
You do not have Airline Rates at this moment		

- **Private Rate Set Name:** Name the Private Rate Set. This name should be easily recognizable as a specific Private Rate Set configuration. An example is *Airline Private Rates* or *Train Private Rates*.
- Click the **Add Rates** button. Select the radio button beside the Airline (Train) Rates List name to add it to the set.

Select One	Name	Submission Date	Active
<input type="radio"/>	<a href="#">Test Rate</a>	August 21, 2007	Yes


- Click **OK** if there is only one list to add, or click the **OK & Add Another** if others need to be added to the set.
- Click **Done** to save the list in the set.



- Click the **Save** to save the new Private Rates Set and **Back to Private Rates** to return to the **Services | Private Rates** page.

### 1.4.2.2 Rental Car / Hotel Discount Code Sets

- **Rental Car / Hotel Discount Code Sets:**

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Private Rates</a>						
<b>Services   Rental Car/Hotel Discount Code Sets</b>						
<b>Rental Car/Hotel Discount Code Sets</b>						
Set Name ▾		Used In Rule				
MC set		Yes <span style="float: right;">✘</span>				
<a href="#">Add A New Rental Car Discount Code Set</a> 						

**Note:** Rental cars must be added to the set for them to appear in trip search results.

**Note:** Add rental car and hotel discount lists to the same set.

**Note:** Add only 3 or 4 hotel discount code lists to one set depending on the GDS.

- Click the **Add A New Rental Car Discount Set** link to add a new set, or click an existing set record to edit that record. The **Service | Add** page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Rental Car/Hotel Discount Code Sets</a>						
<b>Services   Add</b>						
<b>Rental Car/Hotel Private Rate Set</b>						
Rental Car/Hotel Rate Set Name: <input type="text" value="Northeast Rental Car/Hotel Set"/>						
<b>Rental Car/Hotel Discount Codes</b>						
Name	Submission Date	Active				
You do not have Rental Car Rates in this Set at this moment						
					<input type="button" value="Save"/> <input type="button" value="Add Rates"/> <input type="button" value="Cancel"/>	

- **Rental Car / Hotel Rate Set Name:** Name the Private Rate Set. This name should be easily recognizable as a specific Private Rate Set configuration. An example is *Northeast Rental Car/Hotel Set* or *Hotel Rate Codes*.

- Click the **Add Rates** button. Select the radio button beside the Car Rental or Hotel List name to add it to the set.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Add](#)

### Services | Search & Add Discount Code

Search for Rental Car/Hotel Rate Starting with:  [Search](#)

Select One	Name	Submission Date	Active
<input type="radio"/>	ET	August 21, 2007	Yes
<input checked="" type="radio"/>	ZI	August 21, 2007	Yes

[First](#) | 11 - 12 of 12

[OK](#) [OK & Add Another](#) [Done](#)

- Click **OK** if there is only one list to add, or click the **OK & Add Another** if others need to be added to the set.
- Click **Done** to save the list in the set.
- Click the **Save** to save the new Private Rates Set and **Done** to return to the **Services | Private Rates** page.

### 1.4.2.3 Hotel Private Rate Sets

- **Hotel Private Rate Sets:**

Settings Users **Services** Groups Rules Reports Profiles

[Back to Private Rates](#)

### Services | Hotel Private Rate Sets

Set Name	Used In Rule
You do not have Sets for Negotiated Rates at this moment	

[Add A New Hotel Private Rate Set](#)

**Note:** The Hotel Private Rate Set provides a method to upload files using the template supplied. The upload fully replaces an existing file, it does not append to it. Therefore, all records must be loaded each time a change is needed. We also recommend keep a historical file to allow restoring a successful file while research is conducted into a failed upload.

**Note:** If Hotel Search Results are being displayed using the tabbing function, the hotels loaded using the Hotel Private Rate Set upload will be presented to the user within the category of "Corporate Preferred Hotels"

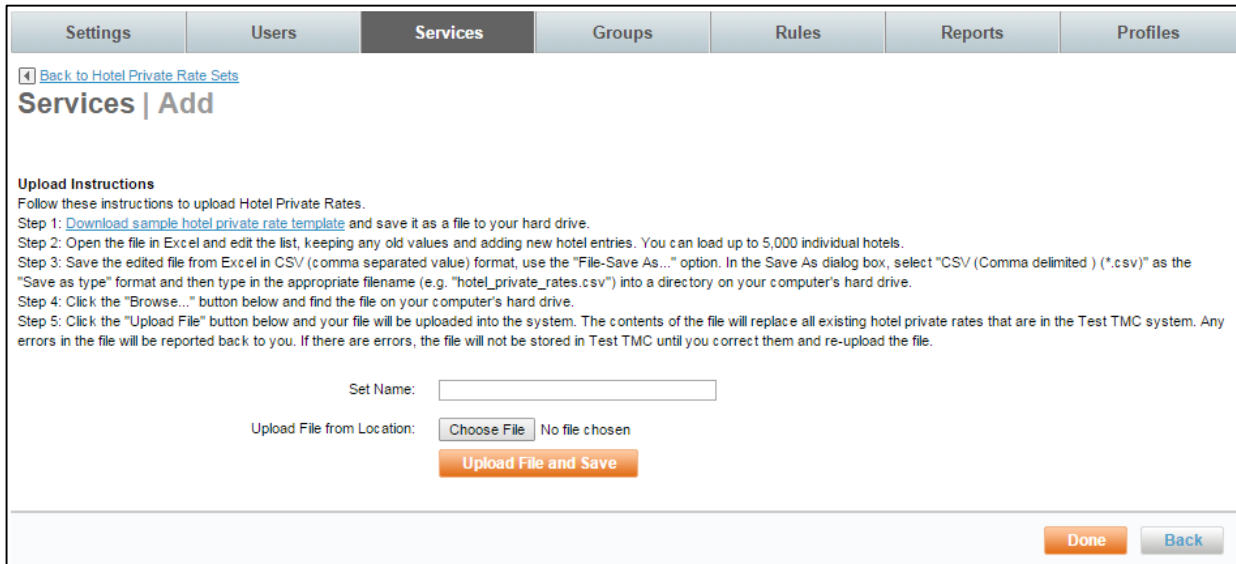
- Click the **Add A New Hotel Private Rate Set** link to add a new set, or click an existing set record to edit that record.



- The **Services | Add** page is displayed providing **Upload Instructions**.

**Best Practice:** It is recommended a new record be created for each upload instead of updating a precious successful record. If the new upload fails for some reason, an older successful version of the upload can quickly be rerun instead of having either no records, or a partial file loaded in the Partner Dashboard because of the upload failure.

The upload function is a FULL file replace. Therefore, if new hotels are to be added to the database, those hotels need to be added to the existing spreadsheet and the entire file needs to be uploaded. Uploading only the new hotel will result in only that hotel being available to the traveler.



- **Set Name:** Name the Hotel Private Rates Set. This name should be easily recognizable and include the run date.
- **Upload File from Location / Choose File:** Click the **Choose File** button to select a file to upload into the Partner Dashboard. The file must conform to Partner Dashboard standards.
- **Upload Instructions:** Follow these instructions to upload Hotel Private Rates.
  - [Download sample hotel private rate template](#) and save it as a file to the hard drive.
  - Open the file in Excel and edit the list, keeping any old values and adding new hotel entries. Up to **5,000 individual hotels** can be loaded.

- Save the edited file from Excel in CSV (comma separated value) format, use the "File-Save As..." option. In the Save As dialog box, select "CSV (Comma delimited) (\*.csv)" as the "Save as type" format and then type in the appropriate filename (e.g. "hotel\_private\_rates.csv") into a directory on the computer's hard drive.
- Click the "Browse..." button below and find the file on the computer's hard drive.
- Click the "Upload File" button below and the file will be uploaded into the system. The contents of the file will replace all existing hotel private rates that are in the site system. Any errors in the file will be reported back to the user who submitted the job. If there are errors, the file will not be stored in the site until they are corrected and re-upload into the database.

1. When the file completes, click **Done** to save the upload.

---

**Note:** Previously uploaded files can be downloaded by clicking the Private Rate Set name on the list and then clicking the **Download** link. The previously uploaded file will download with all fields completed.

---

2. Click **Done** to return to the **Services | Private Rates** page and the **Back to Travel** link to return to the **Travel** page.
3. Click the **“\_ changes not applied”** link to view the changes. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.

## 1.5 Reference Points

Reference points are destinations that are frequently visited by the corporate travelers and must have specific addresses. They may be located within a single city or not. Generally reference points would be the specifics of several locations within a campus or city. An example would be a large corporation may be located in several buildings throughout an area. By defining each location in the Partner Dashboard, accurate distances can be returned when radius searches are performed for car services and hotels.

Reference points are loaded in the Partner Dashboard by the site administrator.

---

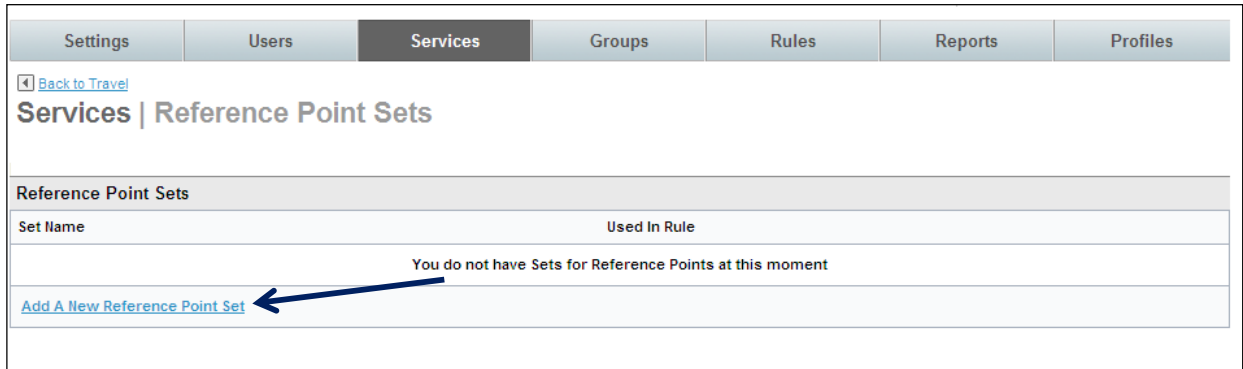
**Note:** When a site is cloned from a template, Reference Points are cloned too. Most Reference Points can remain the same as those found on the template, but some may need to be adjusted depending on the individual site's requirements.

---

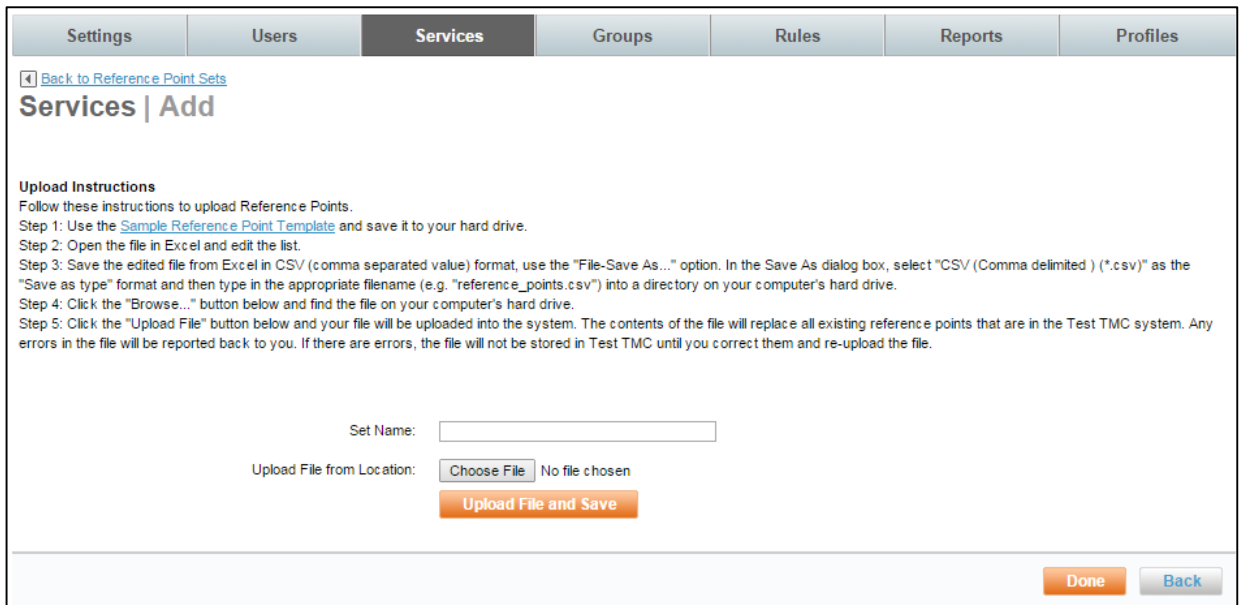
1. Click the **Services** tab.
2. The **Services | Travel** page is displayed. Click the **Reference Points** link.

Settings	Users	Services	Groups	Rules	Reports	Profiles
<b>Services   Overview</b>						
<b>Travel</b> <a href="#">Travel Agency</a> <a href="#">Vendors</a> <a href="#">Travel Policy</a> <a href="#">Policy Display</a> <a href="#">Compliance Codes</a> <a href="#">Custom Fields</a> <a href="#">Alternate Airports</a> <a href="#">Site Payment Cards</a> <a href="#">Corporate Payment Cards</a> <a href="#">Private Rates</a> <a href="#">Hotel Per Diem</a> <a href="#">Reference Points</a> ← <a href="#">Restricted Countries</a>		<b>Airport Parking</b> <a href="#">Configurations for Groups</a> <a href="#">Policies</a>  <b>Car Service</b> <a href="#">Configurations for Groups</a> <a href="#">Policies</a>		<b>Expense</b> Additional charges apply when Expense is enabled. <a href="#">General Settings</a> <a href="#">Configurations for Groups</a> <a href="#">Load Default Expense Settings</a> <a href="#">Payer Management</a>  <b>Shipping</b> <a href="#">General Settings</a> <a href="#">Configurations for Groups</a> <a href="#">Provider Accounts</a> <a href="#">Policies</a>		

- The **Services | Reference Points** page is displayed. Click the **Add a New Reference Points Set** link to add a new reference point file, or click a reference points record to edit that record.



- The **Services | Add** page is displayed providing **Upload Instructions**.



**Best Practice:** It is recommended a new record be created for each upload instead of updating the precious successful record. If the new upload fails for some reason, an older successful version of the upload can quickly be rerun. When the upload fails, no reference points will be displayed to the traveler.

- **Set Name:** Name the Reference Point Set. This name should be easily recognizable and include the run date.
- **Upload File from Location / Choose File:** Click the Choose File button to select a file to upload into the Partner Dashboard. The file must conform to Partner Dashboard standards.
- **Upload Instructions** - Follow these instructions to upload Reference Points.
  - Use the [Sample Reference Point Template](#) and save it to the hard drive.
  - Open the file in Excel and edit the list.
  - Save the edited file from Excel in CSV (comma separated value) format, use the "File-Save As..." option. In the Save As dialog box, select "CSV (Comma delimited) (\*.csv)" as the "Save as type" format and then type in the appropriate filename (e.g. "reference\_points.csv") into a directory on the computer's hard drive.
  - Click the "Browse..." button below and find the file on the computer's hard drive.

- Click the "Upload File" button below and the file will be uploaded into the system. The contents of the file will replace all existing reference points that are in the site system. Any errors in the file will be reported back to the person who submitted the file. If there are errors, the file will not be stored in site until they are corrected and the file is re-uploaded.

---

**Note:** To remove data previously uploaded in a field, it is recommended double quotes ("" ) be entered into the field to completely remove data. This is especially true for fields with a text type.

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5. When the file to upload has been located, click the **Upload File and Save** button to process the file.
6. When the file completes, click **Done** to save the upload.

---

**Note:** Previously uploaded files can be downloaded by clicking the Private Rate Set name on the list and then clicking the **Download** link. The previously uploaded file will download with all fields completed.

---

7. Click **Done** to return to the **Services | Reference Point** page and **Back to Travel** to return to the **Travel** page.
8. Click the **"\_ changes not applied"** link to view the changes. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.