Deem Travel:
Partner Dashboard Training

Day 3 –

Travel (Part 2) Rules
/ Groups Support
Case Entry

(Version 20 January 2016)

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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 covered in these classes. The Profiles tab is covered in the Advanced User Data class.

1.1 Custom Fields

Custom fields are used when agencies require data that is not already being collected by Deem to support either specialized booking or profile requirements. Custom fields can be created using the Deem customizable profile field tool if the field will be used for reporting or by creating a new, custom field if the field is needed for booking or purchase page display.

When a site is cloned from a template, any custom fields found on the template will be created on the cloned site.

Note: Custom fields are not reportable in our standard reports.

Note: Custom fields cannot be used as a Group Parameter.

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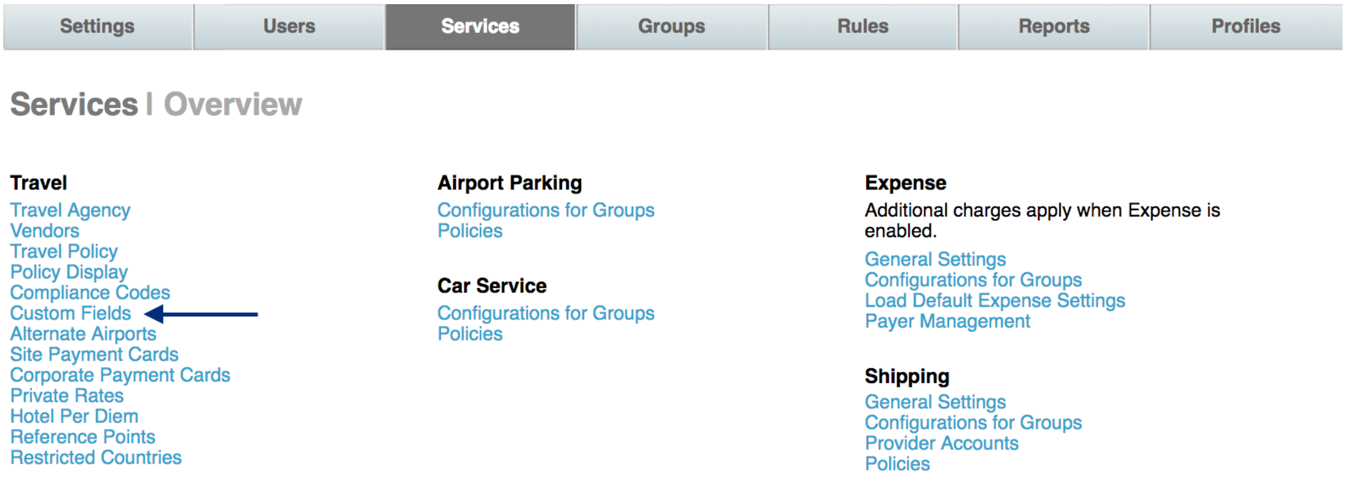
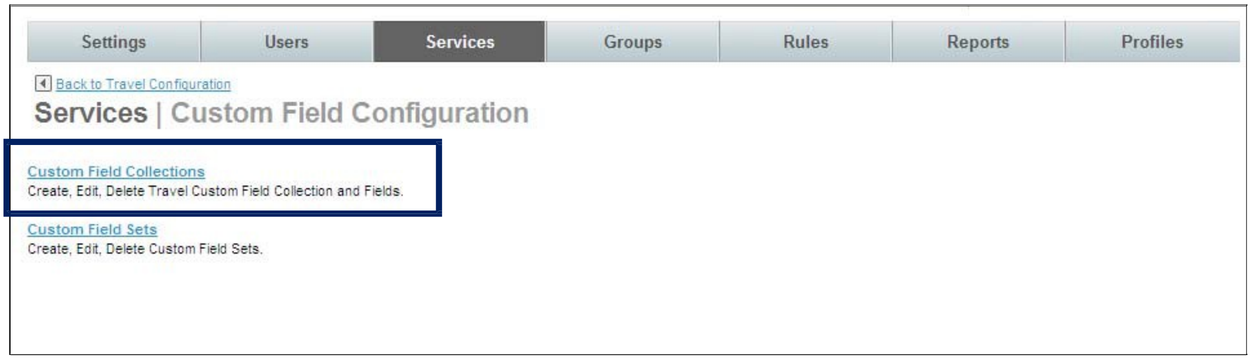
1. Click the **Services** tab then the **Travel** link in the **Travel** section of the page.
2. The **Services / Travel** page is displayed. Click the **Custom Field Configuration** link.



Settings
Users
Services
Groups
Rules
Reports
Profiles
Services I 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
General Settings
Configurations for Groups
Load Default Expense Settings
Payer Management
Shipping
General Settings
Configurations for Groups
Provider Accounts
Policies

Additional charges apply when Expense is enabled.

3. The **Services** | **Custom Field Configuration** page is displayed. Click the **Custom Field Collections** link.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Configuration

Services | Custom Field Configuration

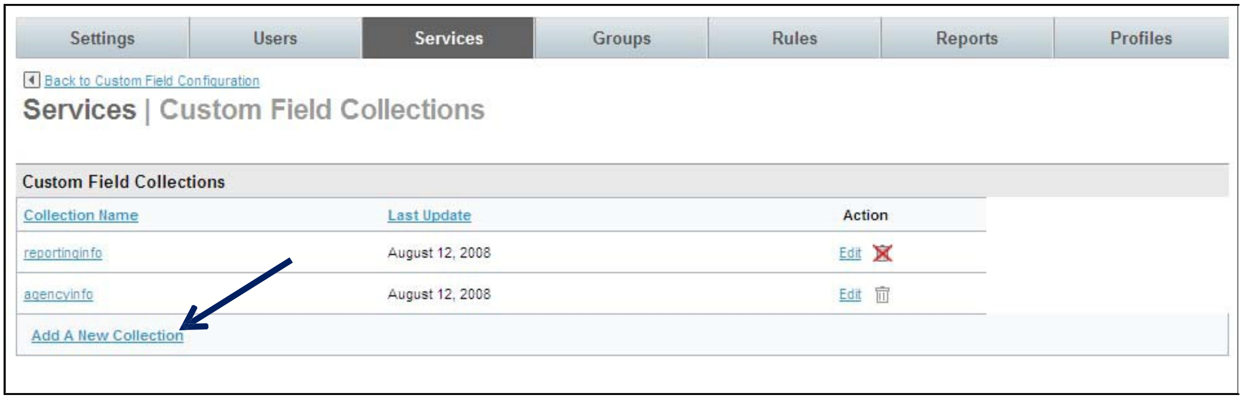
Custom Field Collections
Create, Edit, Delete Travel Custom Field Collection and Fields.

Custom Field Sets
Create, Edit, Delete Custom Field Sets.

1.1.1 Custom Field Collections

Note: Custom fields use the List and Set structure. Think of the Collection as the List with an additional layer below it for the custom field definition itself. To create and implement custom fields, first create the collection and add custom fields to it then the collection is added to a Set. The set is attached to Service Rules to define what groups of users will see the custom fields.

1. The **Services** | **Custom Field Collections** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Custom Field Configuration

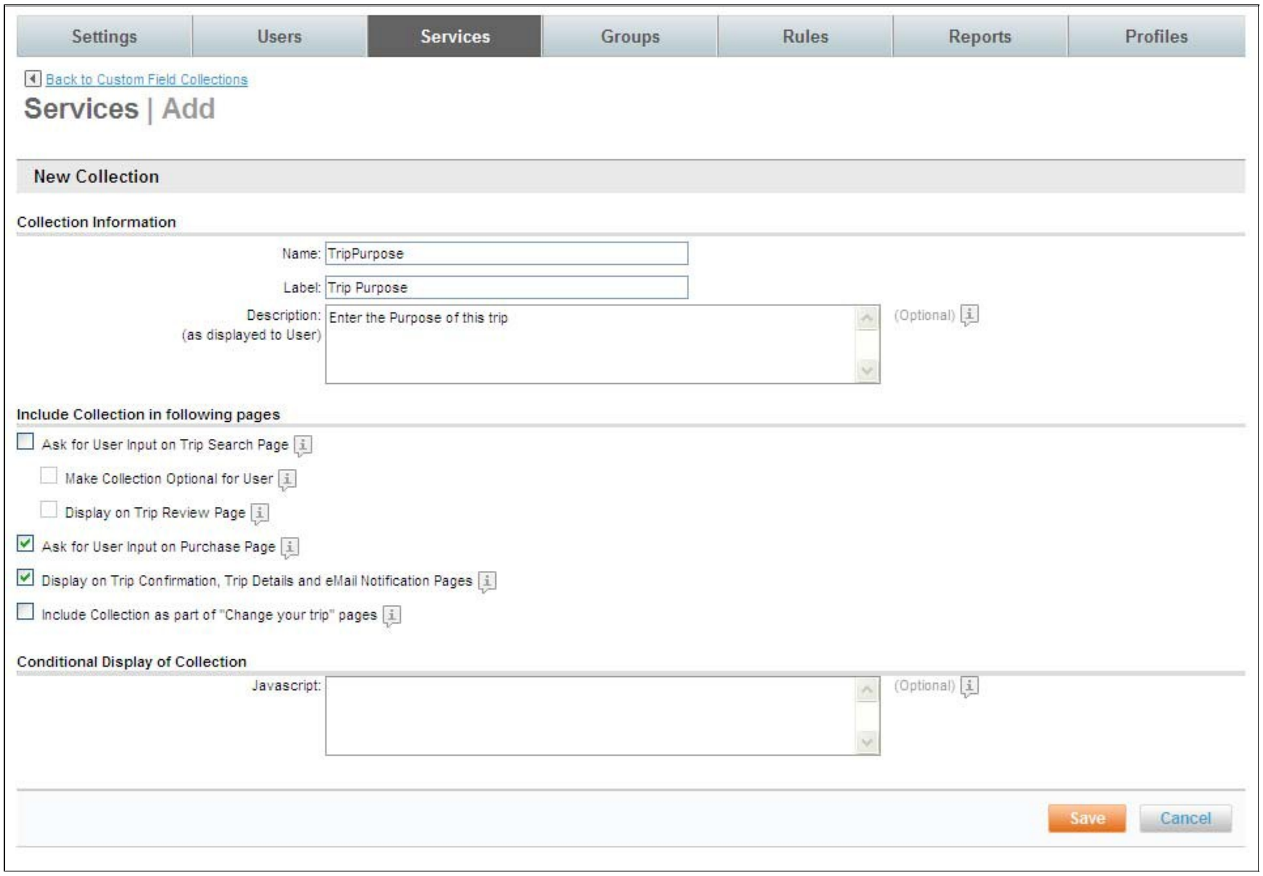
Services | Custom Field Collections

Custom Field Collections

Collection Name	Last Update	Action
reportinginfo	August 12, 2008	Edit
agencyinfo	August 12, 2008	Edit

Add A New Collection

2. Click the **Add A New Collection** link to add a new custom field. The **Services | Add** page is displayed. Complete the page:



Services | Add

New Collection

Collection Information

Name: TripPurpose

Label: Trip Purpose

Description: (as displayed to User) Enter the Purpose of this trip (Optional)

Include Collection in following pages

☐ Ask for User Input on Trip Search Page
  ☐ Make Collection Optional for User
  ☐ Display on Trip Review Page
☑ Ask for User Input on Purchase Page
☑ Display on Trip Confirmation, Trip Details and eMail Notification Pages
☐ Include Collection as part of "Change your trip" pages

Conditional Display of Collection

Javascript: (Optional)

x **New Collection:**

- **Name:** Name the collection. This is the name the database will use in reference to this collection. The name cannot include any spaces and has a maximum length of 128 characters. The value can be alphanumeric, but the first character must be an alpha character. The collection name must be unique and is case sensitive.
- **Label:** Enter the label that will be displayed to the user as a header on the box that lists custom fields.
- **Description: (as displayed to User):** This field will be displayed to the user as text within the box that lists custom fields.

ƒ **Include Collection in following pages:**

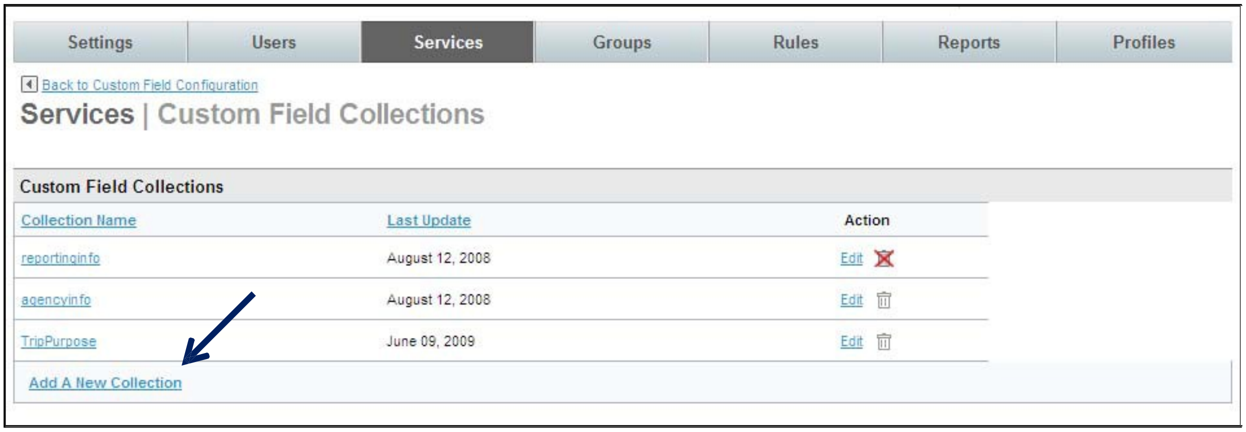
- **Ask for User Input on Trip Search Page:** By selecting this checkbox, the user will see the custom field on the Trip Search page.
  - **Make Collection Optional for User:** By selecting this checkbox, custom field will be required on the Trip Search page.
  - **Display on Trip Review Page:** By selecting this checkbox, the user will see (but not be able to edit) the custom field on the Trip Review page. It is recommended that if the field is displayed on the Trip Search page, it be shown on the Review page as well.
- **Ask for User Input on Purchase Page:** By selecting this checkbox, the user will see the custom field on the Trip Purchase page.

  - **Display on Trip Confirmation, Trip Details and eMail Notification Pages:** By selecting this checkbox, the user will see the custom field on the Trip Confirmation, Trip Details and eMail Notification Pages.
  - **Include Collection as part of "Change your trip" pages:** By selecting this checkbox, the user will see the custom field on "Change your trip" pages.
- **Conditional Display of Collection:**
  - **JavaScrip**t: By entering JavaScript, set conditions for which the custom field will be displayed or not. An example is that if the arrival city is Miami, display a custom field. For any other arrival city, the custom field would not be displayed.

Note: Enter a ticket if assistance from the Deem Configuration Team is needed with the JavaScript modification.

---

3. Click **Save** to save the custom field collection. The **Services | Custom Field Collections** page is redisplayed. Click the **Collection Name** link to add fields to it.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Custom Field Configuration

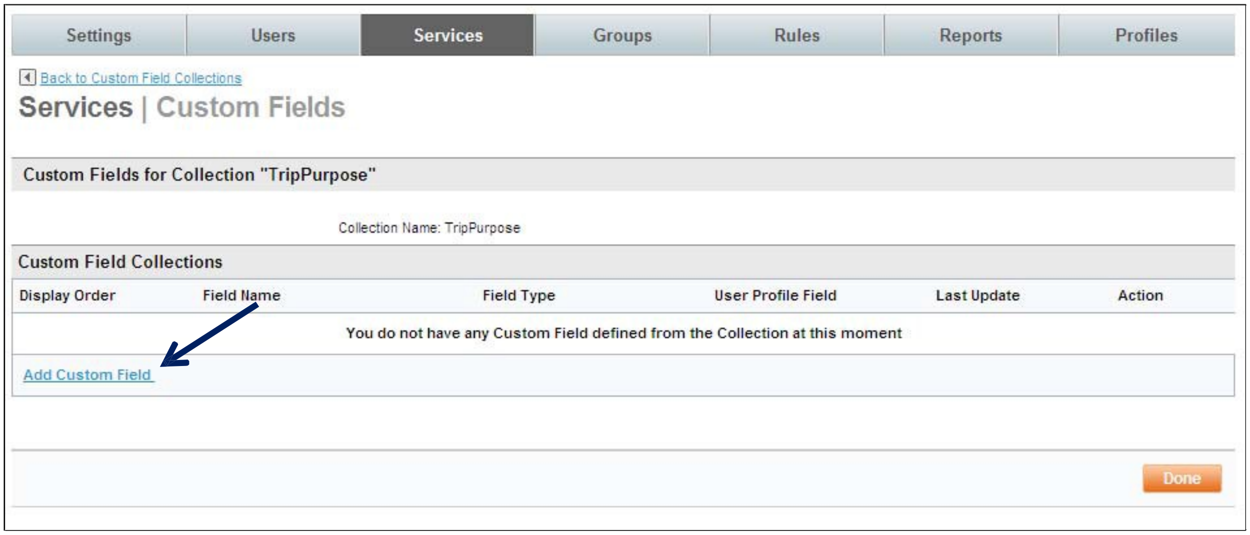
Services | Custom Field Collections

Custom Field Collections

Collection Name	Last Update	Action
reportinginfo	August 12, 2008	Edit
agencyinfo	August 12, 2008	Edit
TripPurpose	June 09, 2009	Edit

Add A New Collection

4. The **Custom Fields** page is displayed. Click the **Add Custom Field** link.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Custom Field Collections

Services | Custom Fields

Custom Fields for Collection "TripPurpose"

Collection Name: TripPurpose

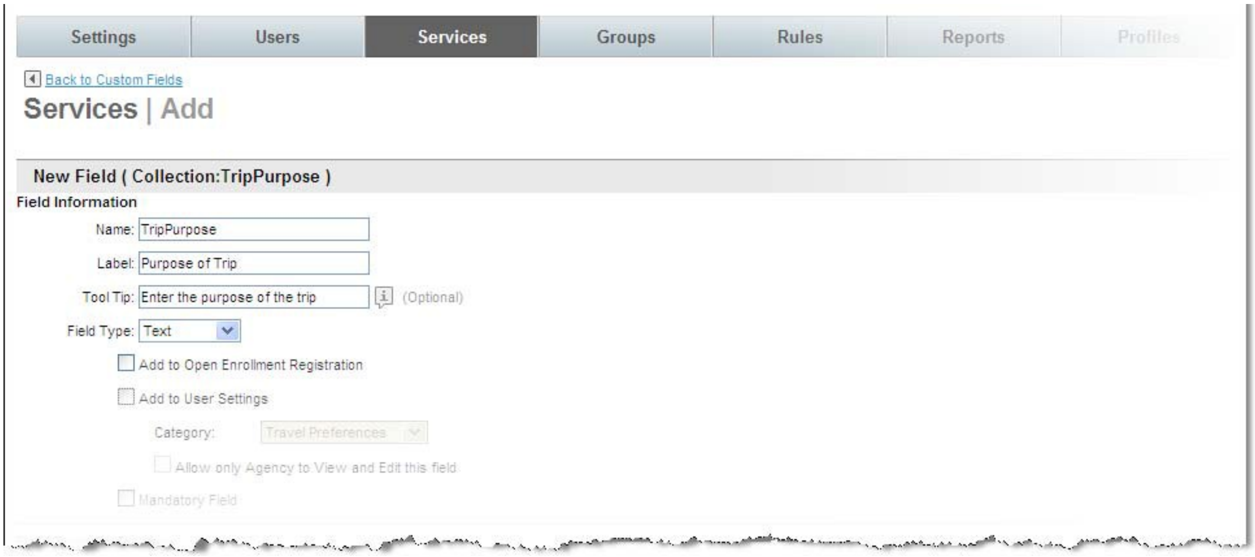
Custom Field Collections

Display Order	Field Name	Field Type	User Profile Field	Last Update	Action
You do not have any Custom Field defined from the Collection at this moment					

Add Custom Field

Done

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



Services | Add

New Field (Collection:TripPurpose)

Field Information

Name: TripPurpose

Label: Purpose of Trip

Tool Tip: Enter the purpose of the trip (Optional)

Field Type: Text

☐ Add to Open Enrollment Registration

☐ Add to User Settings

Category: Travel Preferences

☐ Allow only Agency to View and Edit this field

☐ Mandatory Field

- **New Field** (within Collection:name):
  - **Field Information:**
    - **Name:** Enter a name for this custom field. This is the name the database will use in reference to this field.

Note: Any changes to the field name once it is saved will result in the need for programming changes. The name cannot include any spaces and has a maximum length of 128 characters. This field can be alphanumeric, but the first character must be an alpha character. The field name must be unique and is case sensitive.

- **Label:** Enter the label that will be displayed to the user
- **Tool Tip:** Enter a tip that can be displayed to the user
- **Field Type:** Select *Text, Checkbox, Date/Time, Number, List* or *PTA* from the drop down list.

Important Note: Once the field has been saved, the field type cannot be changed.

Note: PTA will appear if Pre-trip Approval has been enabled. PTA is discussed in other documentation.

Note: Field Type Preference will differ depending on the selection made to Field Type.

- **Add to Open Enrollment Registration:** Select this checkbox if the field is to appear in open enrollment registration.
- **Add to User Settings:** Select this checkbox if the field is to appear in user settings.
  - **Category:** Select the user setting *Personal Information, Contact Information, Employee Information, Business Address, Home Address, Emergency Contact* or *Travel Preferences* from the drop down list.
  - **Allow only Agency to View and Edit this field:** Select this checkbox if only agency users can see or change this field.
- **Mandatory Field:** Select this checkbox if the field will be required

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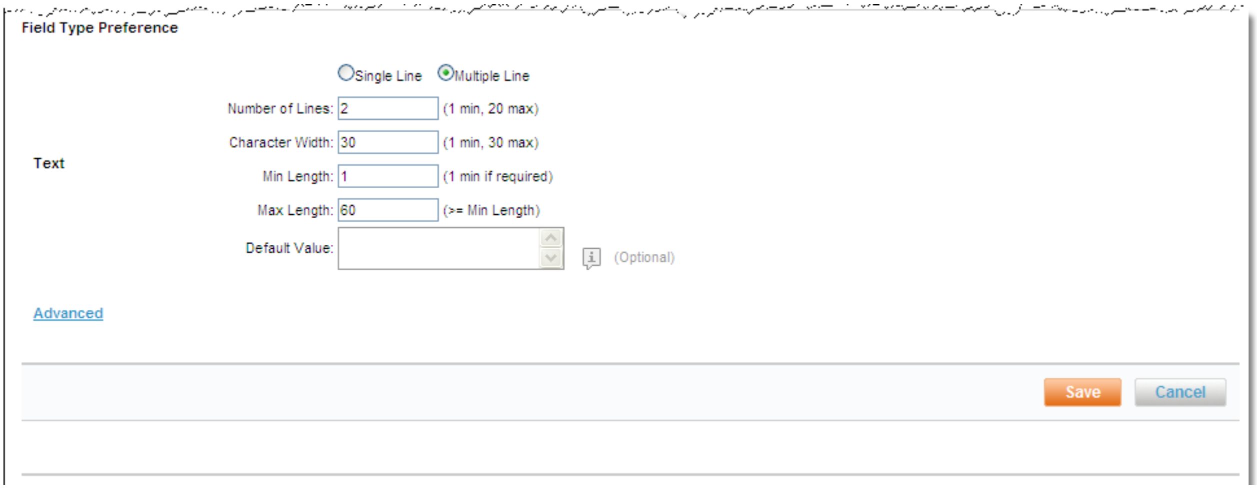
Note: Field Type Preference will differ depending on the selection made for Field Type.

- **Field Type Preference – Text**



Field Type Preference

Text

○ Single Line ● Multiple Line

Number of Lines: 2 (1 min, 20 max)

Character Width: 30 (1 min, 30 max)

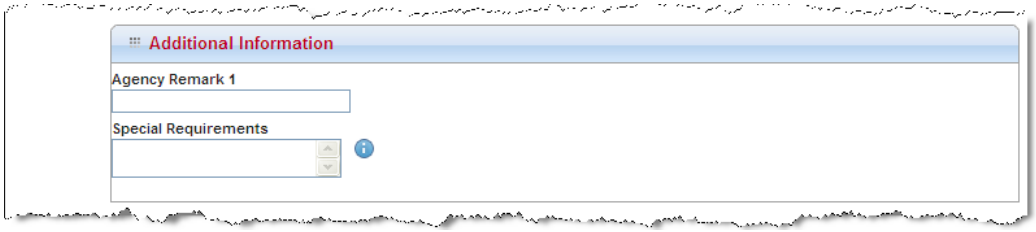
Min Length: 1 (1 min if required)

Max Length: 60 (>= Min Length)

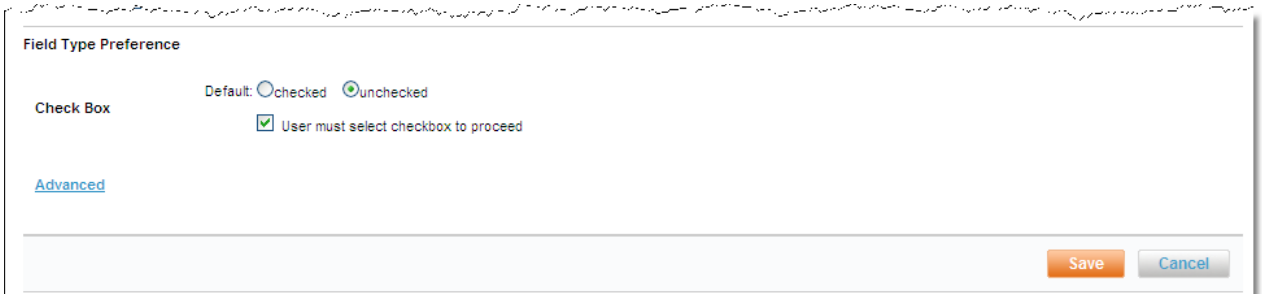
Default Value: (Optional)

- **Single Line / Multiple Lines**: Select if the text field will allow single or multiple line entry.
- **Number of Lines:** If Multiple Line was selected, how many text lines can be entered – minimum is 1 and maximum is 20 lines.
- **Character Width:** This is set to 30. This represents the number of characters allowed in the text box before a carriage return would occur.
- **Min Length:** Enter the minimum allowable length for the entire field with a minimum of 1 if the field is required.
- **Max Length:** Enter the maximum allowable length for the entire field with a maximum of at least greater than the minimum.
- **Default Value:** Enter the value to display as a default.

  An example of this would be if the traveler has any special requirements while traveling. The "Special Requirements" text box would be displayed on the user profile.



- **Field Type Preference – Checkbox**



Field Type Preference

Check Box

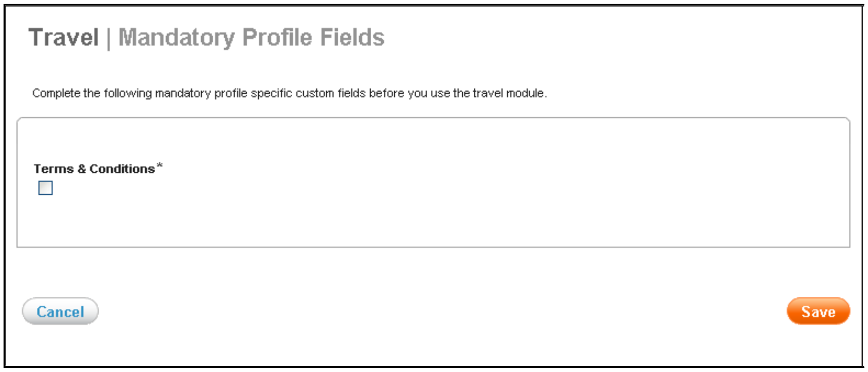
Default: ○ checked ● unchecked

☑ User must select checkbox to proceed

- **Default:** Select either *Checked* or *Unchecked* as the default for the checkbox.

- **User must select checkbox to proceed:** Before a user can move on in the application, the checkbox must be marked. It is recommended the checkbox be unchecked as the default.

  An example of this would be if Terms and Conditions have been presented. The "I Accept" or "I Do Not Accept" checkbox would have to be selected before the user could leave the page.

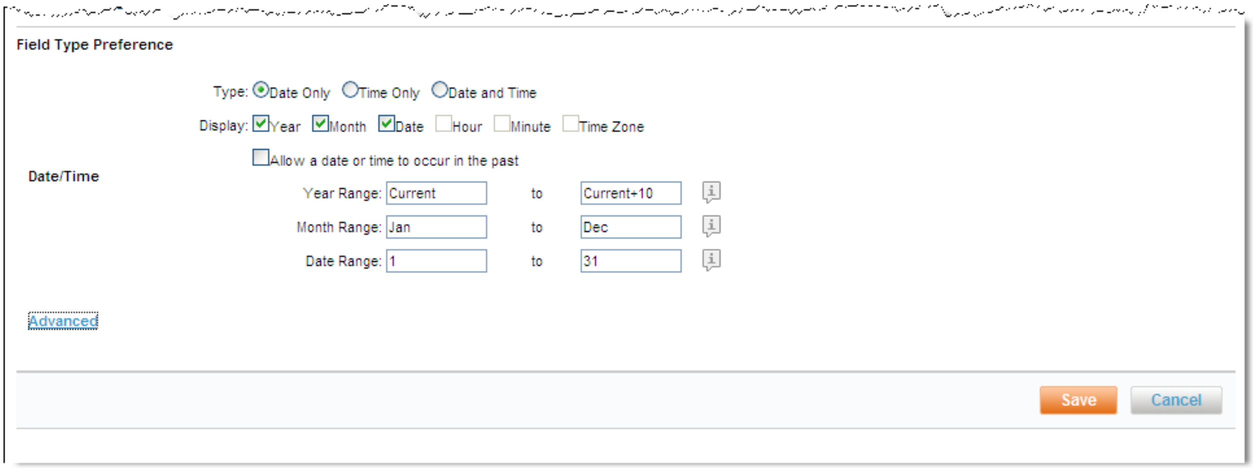


Travel | Mandatory Profile Fields

Complete the following mandatory profile specific custom fields before you use the travel module.

Terms & Conditions*
☐

- **Field Type Preference – Date / Time**



Field Type Preference

Date/Time

Type: ● Date Only ○ Time Only ○ Date and Time

Display: ☑ Year ☑ Month ☑ Date ☐ Hour ☐ Minute ☐ Time Zone

☐ Allow a date or time to occur in the past

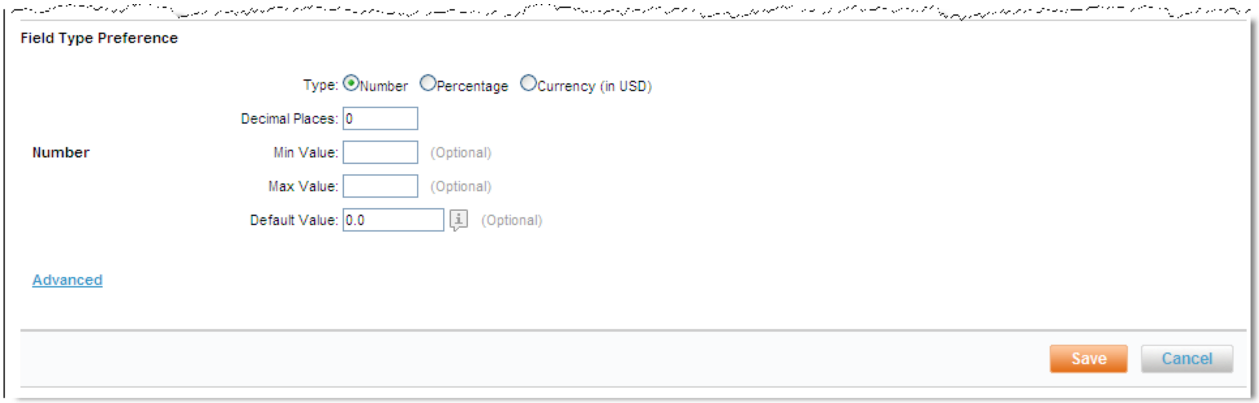
Year Range: Current to Current+10

Month Range: Jan to Dec

Date Range: 1 to 31

- **Type:** Select *Date only*, *Time only*, or *Date and time* from the drop down list.
- **Display:** Select *Year*, *Month*, *Date Hour Minute*, and / or *Time* Zone checkboxes as appropriate.
- **Allow a date or time to occur in the past:** Select this checkbox if past dates or times will be allowed.
- **Year Range:** Enter the beginning and ending year range allowed. Use *Current* to begin the range with the current year and *Current+X* to say how many years in the future the date entered can be. Current+5 will be this year plus 5 years.
- **Month Range:** Enter the beginning and ending month. Generally, *Jan* and *Dec* are entered
- **Date Range:** Enter the beginning and ending date range allowed. Generally, *1* and *31* are used.

- **Field Type Preference – Number**



Field Type Preference

Number

Type: ● Number ○ Percentage ○ Currency (in USD)

Decimal Places: 0

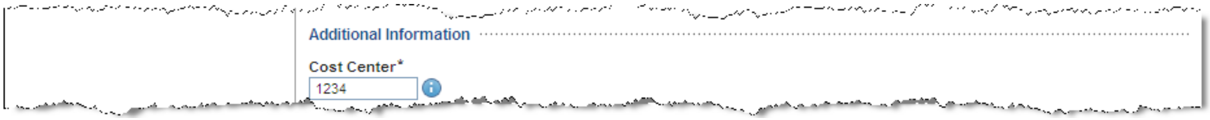
Min Value: (Optional)

Max Value: (Optional)

Default Value: 0.0 (Optional)

  - **Type:** Select *Number, Percentage,* or *Currency* from the drop down list.
  - **Decimal places:** Enter the number of decimal places.
  - **Min Value:** Enter the minimum value allowed in this field.
  - **Max Value:** Enter the maximum value allowed in this field. If the field is to be sent to the GDS during profile synchronization, the maximum value (not number of characters) must be less than 30. Maximum number of characters is 8.
  - **Default Value:** Enter the value to display as a default.

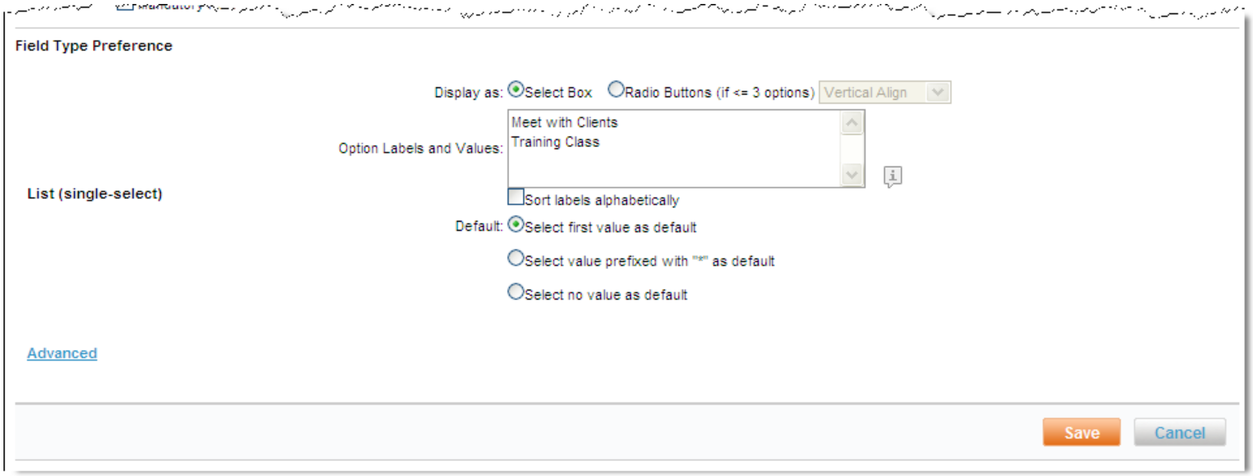
  An example of this would be the employee's Cost Center.



Additional Information

Cost Center*: 1234

- **Field Type Preference – List**



Field Type Preference

List (single-select)

Display as: ● Select Box ○ Radio Buttons (if <= 3 options) Vertical Align

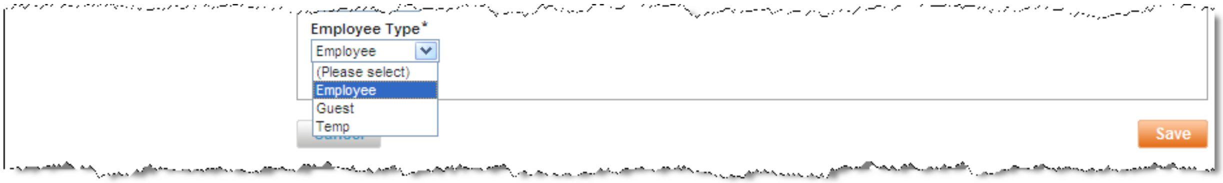
Option Labels and Values:
Meet with Clients
Training Class

☐ Sort labels alphabetically

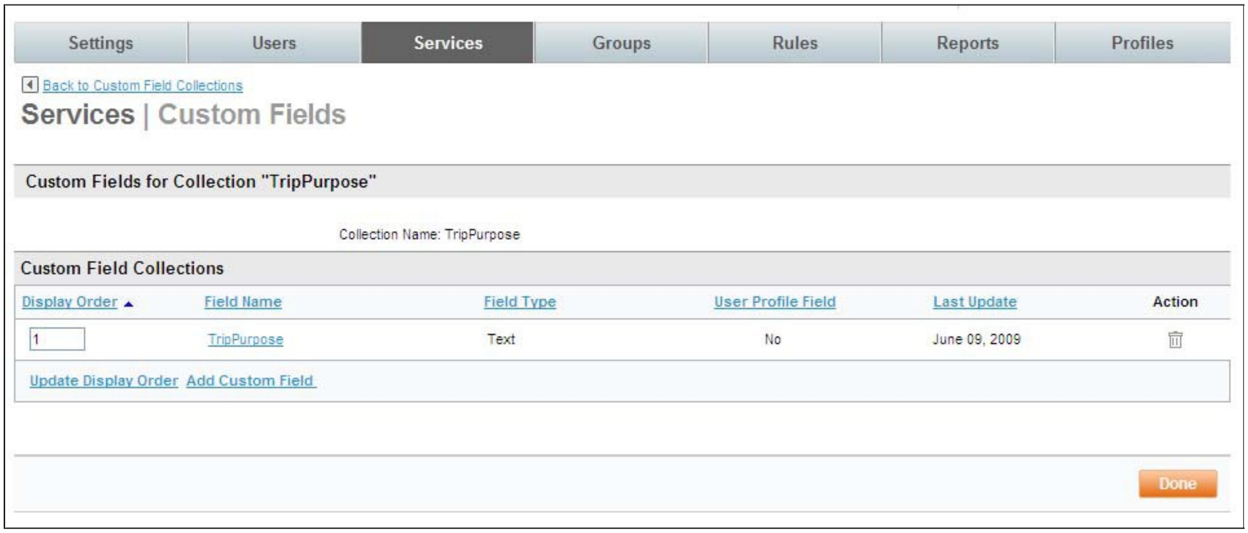
Default: ● Select first value as default
○ Select value prefixed with "*" as default
○ Select no value as default

  - **Display as:** Select *Select Box* or *Radio Buttons* from the drop down list.
  - **Option Labels and Values:** Enter the labels which will be displayed to the user and the value that will be placed in the record separated by an equal sign. Example: "Cost Center=CC". Generally, "Select no value as default" is selected.

An example of this would be the Employee Type.


Employee Type*
Employee
(Please select)
Employee
Guest
Temp
Save

6. Click **Save** to save the Custom Field and **Done**.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Custom Field Collections
Update Display Order
Add Custom Field
Done

Services | Custom Fields

Custom Fields for Collection "TripPurpose"

Collection Name: TripPurpose

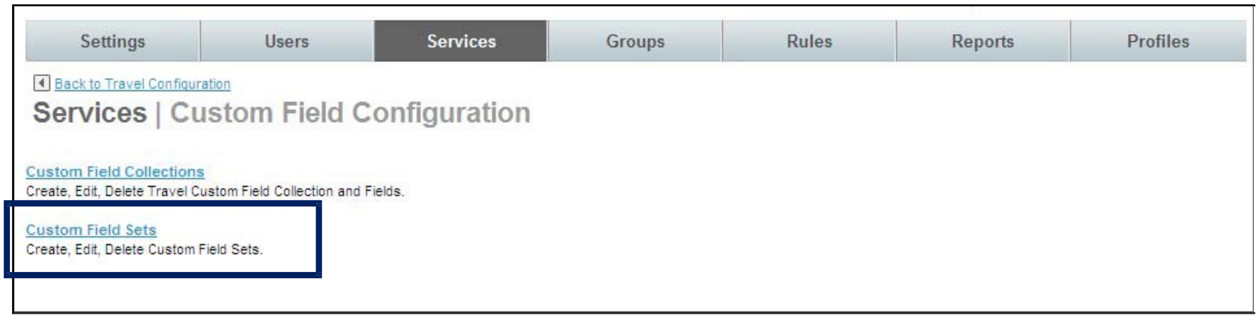
Custom Field Collections

Display Order ▲	Field Name	Field Type	User Profile Field	Last Update	Action
1	TripPurpose	Text	No	June 09, 2009	🗑

7. The **Services** | **Custom Field Collections** page is redisplayed. Enter a display order and click the **Update Display Order** to rearrange the order of the custom fields within the collection. Click the **Add Custom Field** link to add additional custom fields to this Collection or click **Done** to return to the **Services** | **Custom Field Collections** page.

1.1.2 *Custom Fields Sets*

1. Next we will add the Collection to a Set. Click the **Back to Custom Field Configurations** link at the top of the page. The **Services** | **Custom Field Configuration** page is displayed.

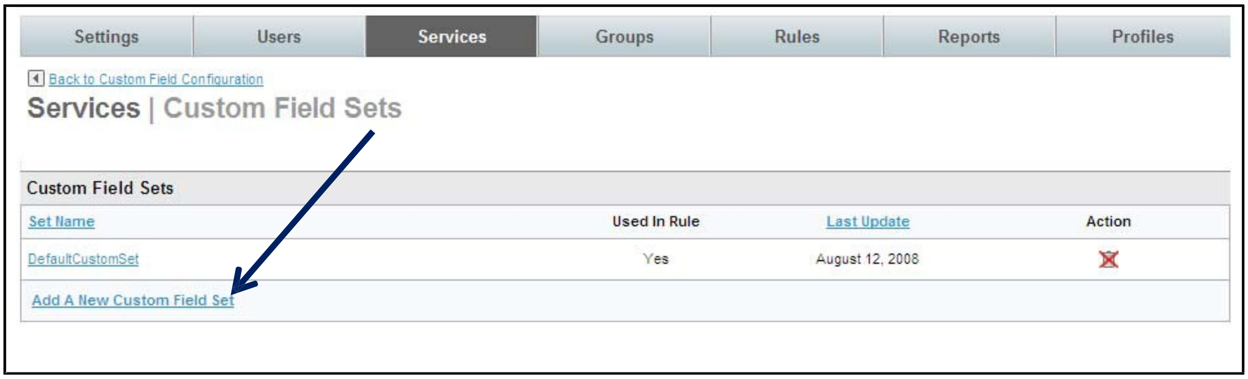

Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Configuration
Custom Field Collections
Custom Field Sets

Services | Custom Field Configuration

Custom Field Collections
Create, Edit, Delete Travel Custom Field Collection and Fields.

Custom Field Sets
Create, Edit, Delete Custom Field Sets.

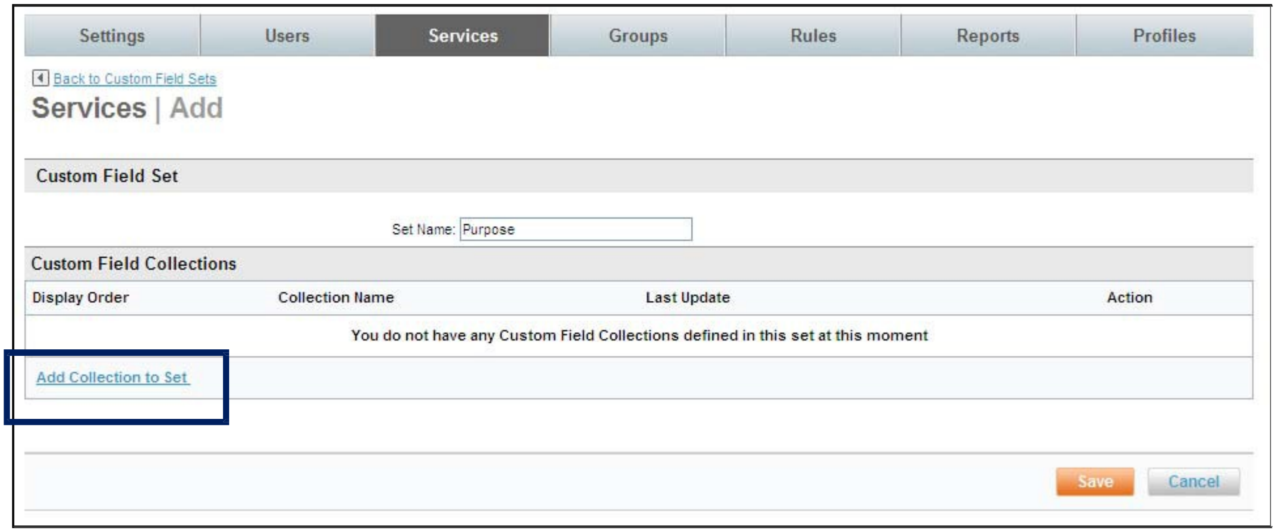
2. Click the **Custom Field Sets** link. The **Services** | **Custom Field Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Custom Field Configuration
Services | Custom Field Sets
Add A New Custom Field Set

Custom Field Sets

Set Name	Used In Rule	Last Update	Action
DefaultCustomSet	Yes	August 12, 2008	☒

3. Click **Add A New Custom Field Set** link. The **Services** | **Add** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Custom Field Sets
Services | Add
Add Collection to Set
Save
Cancel

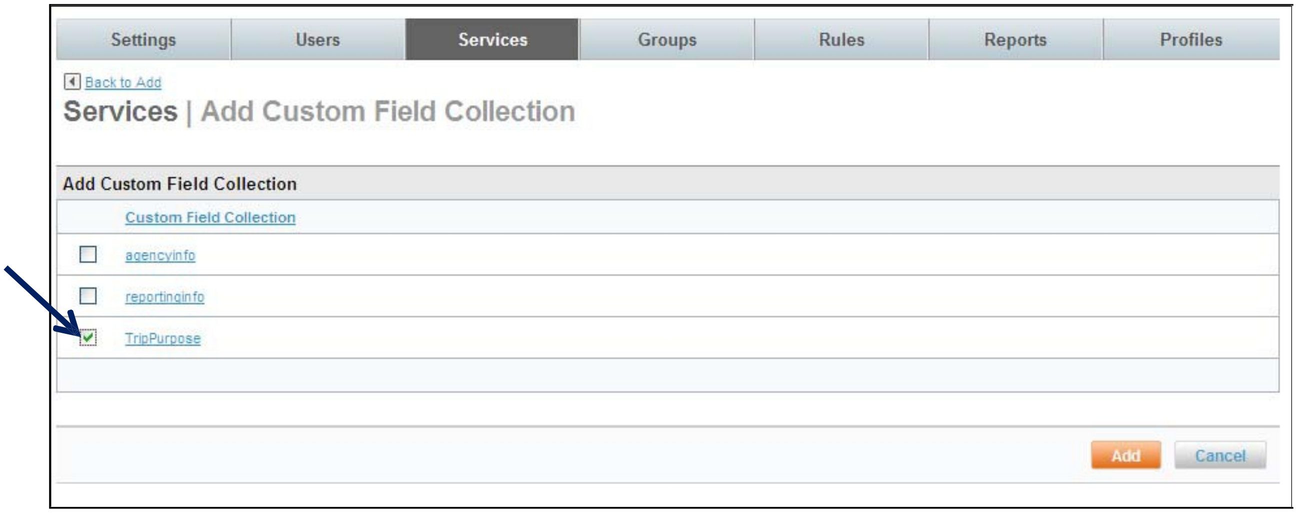
Custom Field Set

Set Name: Purpose

Custom Field Collections

Display Order	Collection Name	Last Update	Action
You do not have any Custom Field Collections defined in this set at this moment			

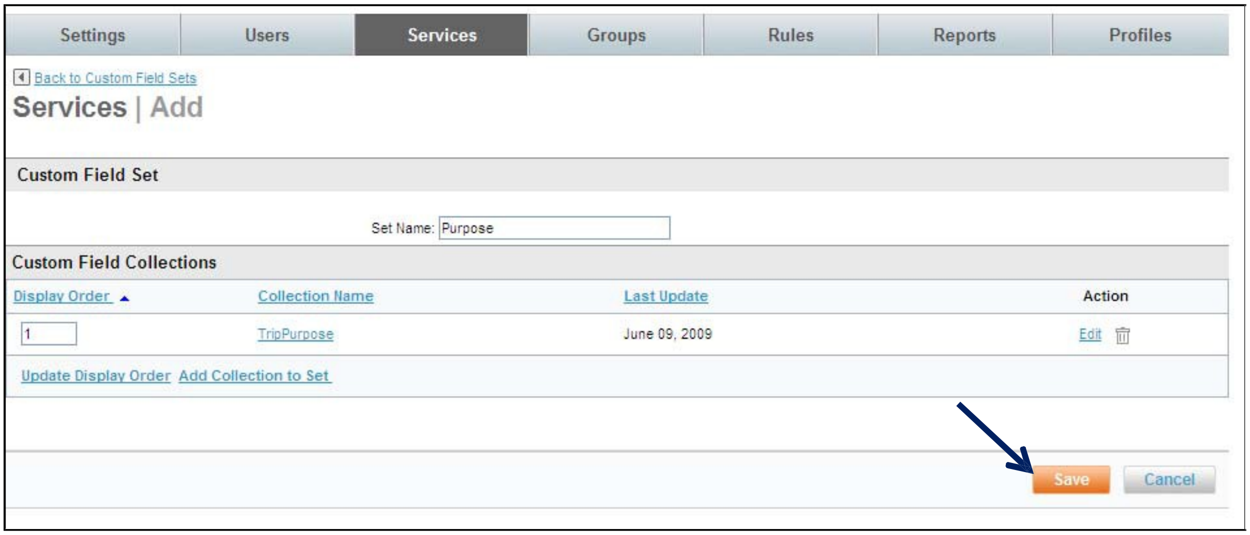
4. Enter a **Set Name** for the Set and click **Add Collection to Set** link. The **Services** | **Add Custom Field Collection** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Add
Services | Add Custom Field Collection
Add
Cancel

Add Custom Field Collection

	Custom Field Collection
☐	agencyinfo
☐	reportinginfo
☑	TripPurpose

5. Select the radio button beside the **Custom Field Collections** one at a time to add them to this set. Click **Add.** The **Services** | **Add** page is redisplayed.



Services | Add

Custom Field Set

Set Name: Purpose

Custom Field Collections

Display Order	Collection Name	Last Update	Action
1	TripPurpose	June 09, 2009	Edit

Update Display Order Add Collection to Set

6. Click **Save** to save the configuration. The **Services** | **Custom Field Sets** page is redisplayed.

1.2 Vendor Management

Preferred and restricted vendors are identified within the Vendor Management section of the Services | Travel Tab. Preferred and restricted vendors can be included within the search results, or segregated out depending on how they are configured. They can be specific to a location or set up to be global or worldwide.

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

1.2.1 Vendor Management List Items

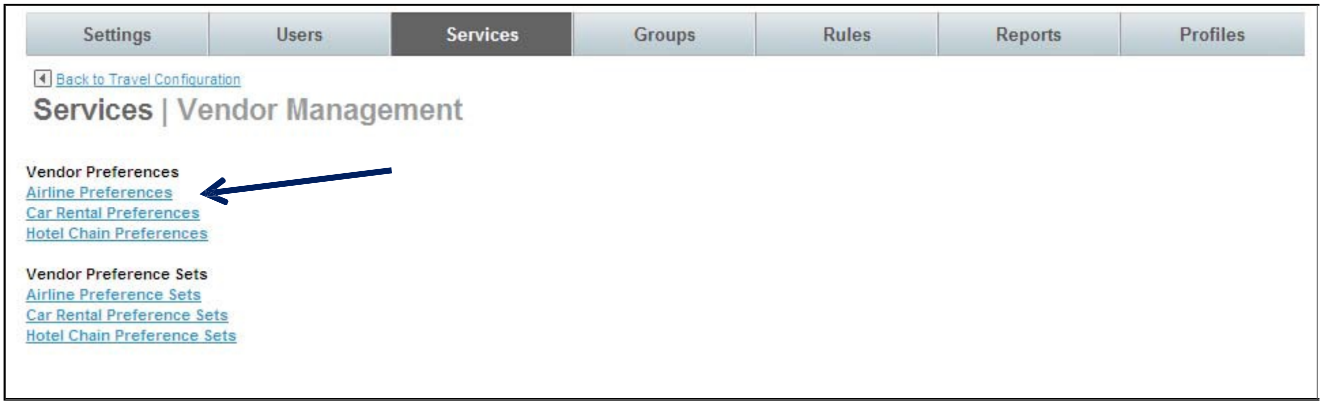
Note: The *Vendor Management Preferences* adhere to the List and Set structure

---

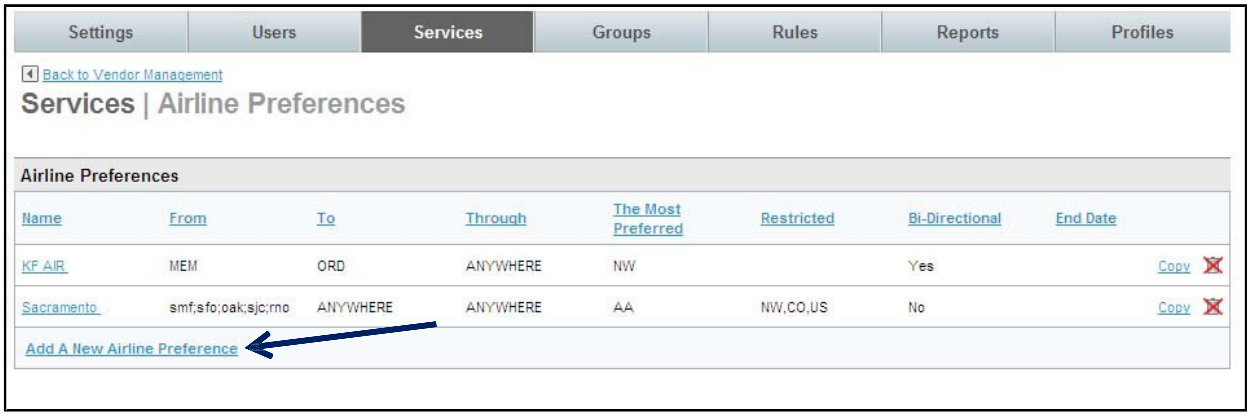
1. Click the **Services tab** then the **Vendors** link .
2. The **Services** | **Vendor Management** page is displayed.

1.2.1.1 Airline Preferences

1. Click the **Airline Preferences** link.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Configuration
Services | Vendor Management
Vendor Preferences
Airline Preferences
Car Rental Preferences
Hotel Chain Preferences
Vendor Preference Sets
Airline Preference Sets
Car Rental Preference Sets
Hotel Chain Preference Sets

2. The **Services** | **Airline Preferences** page is displayed. Click the **Add A New Airline Preference** link to add a new preference, or click an existing preference record to edit that record.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Vendor Management

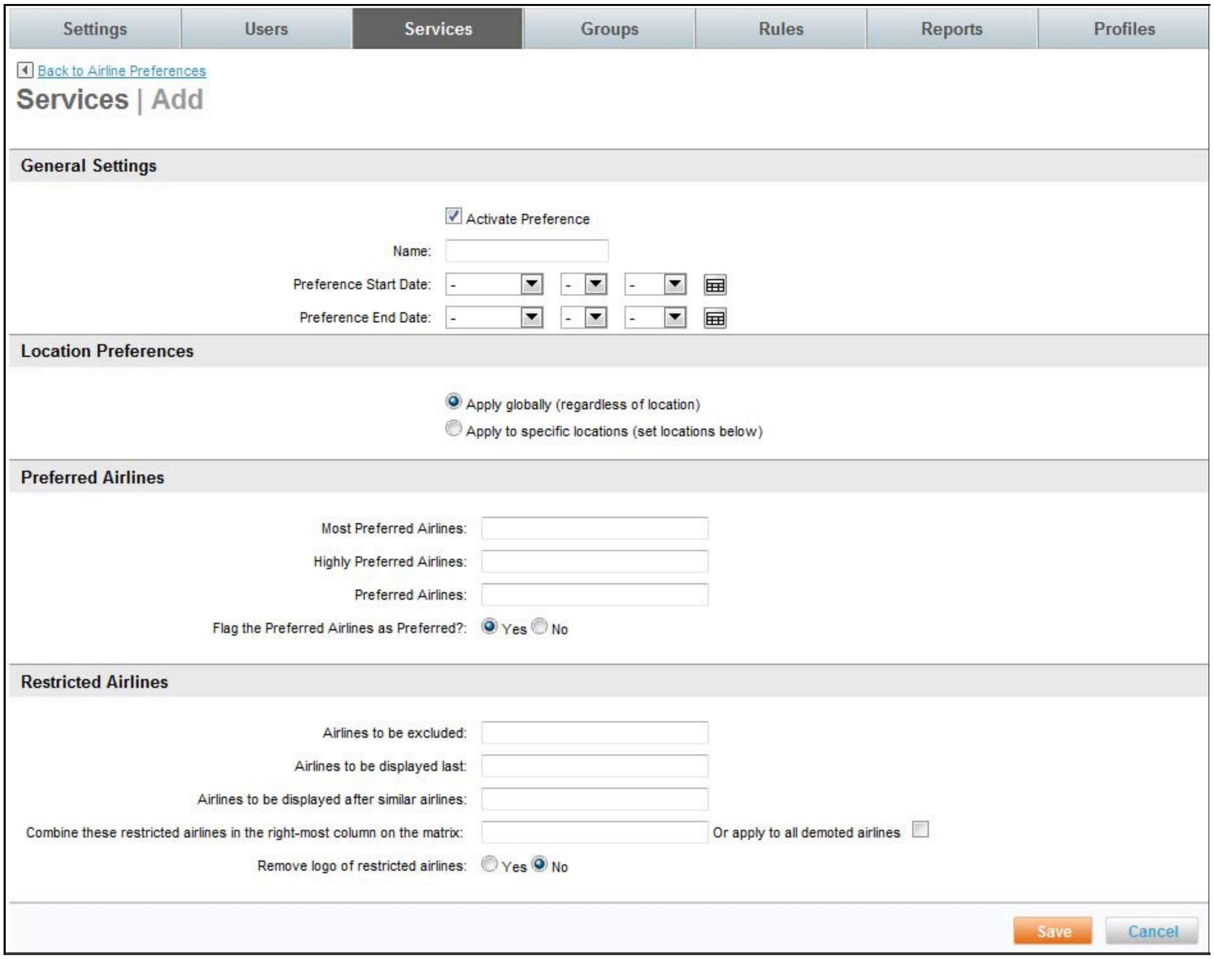
Services | Airline Preferences

Airline Preferences

Name	From	To	Through	The Most Preferred	Restricted	Bi-Directional	End Date	
KF AIR	MEM	ORD	ANYWHERE	NW		Yes		Copy ☒
Sacramento	smf;sfo;oak;sjc;rno	ANYWHERE	ANYWHERE	AA	NW,CO,US	No		Copy ☒

Add A New Airline Preference

3. The **Services** | **Add** page is displayed. Complete the page.
   - **Airline Preferences:**


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Airline Preferences

Services | Add

General Settings

☑ Activate Preference
Name:
Preference Start Date: - - -
Preference End Date: - - -

Location Preferences

● Apply globally (regardless of location)
○ Apply to specific locations (set locations below)

Preferred Airlines

Most Preferred Airlines:
Highly Preferred Airlines:
Preferred Airlines:
Flag the Preferred Airlines as Preferred?: ● Yes ○ No

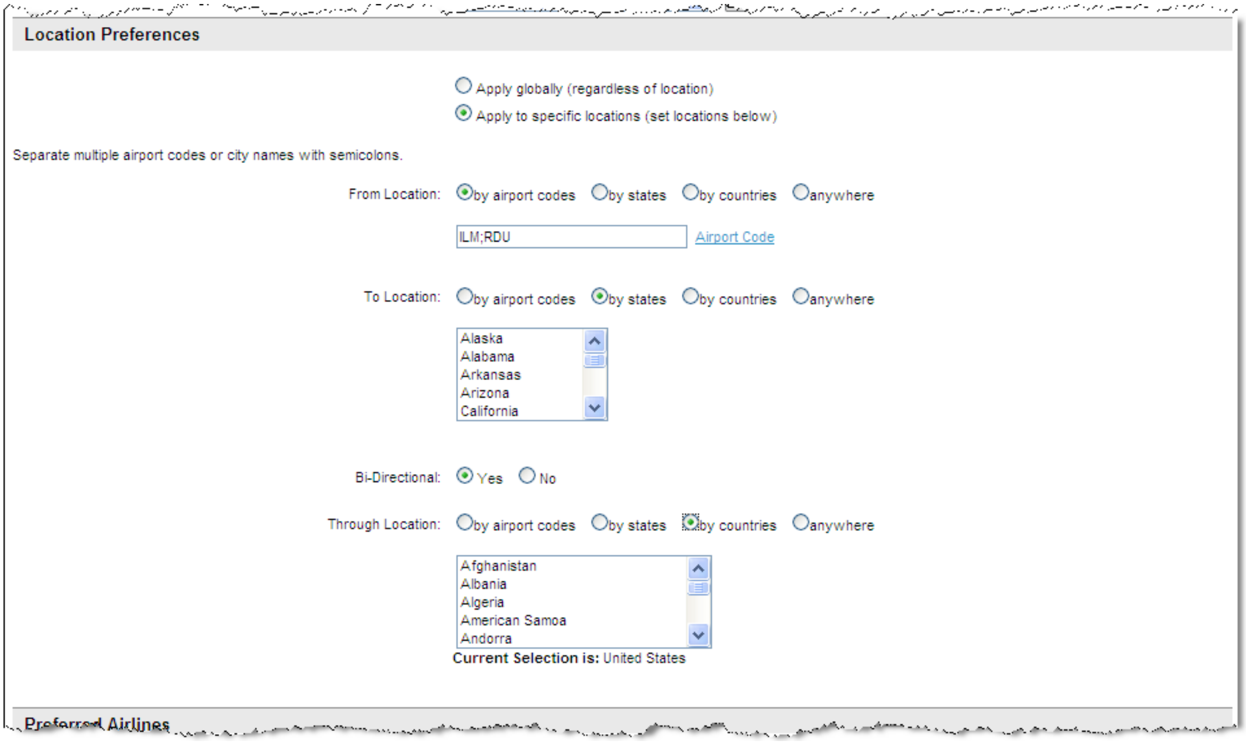
Restricted Airlines

Airlines to be excluded:
Airlines to be displayed last:
Airlines to be displayed after similar airlines:
Combine these restricted airlines in the right-most column on the matrix: Or apply to all demoted airlines ☐
Remove logo of restricted airlines: ○ Yes ● No

Save
Cancel

- **General Settings:**
  - **Activate Preference:** Select the checkbox to activate the preference.

  - **Name:** Name the airline preference to help recognize the market to which it applies. An example is *DFW to PHL* to show that this airline preference is for the market of Dallas to Philadelphia.
  - **Preference 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 preference will not take effect upon the save of the record.
  - **Preference 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 preference has an anticipated end date.
- **Location Preference:**
  - **Apply globally (regardless of location):** Select this radio button if the preference applies to all origination and destination locations
  - **Apply to specific locations (set locations below):** Select this radio button if the preference applies to specified origination and destination locations.



Location Preferences

○ Apply globally (regardless of location)
● Apply to specific locations (set locations below)

Separate multiple airport codes or city names with semicolons.

From Location: ● by airport codes ○ by states ○ by countries ○ anywhere
ILM;RDU Airport Code

To Location: ○ by airport codes ● by states ○ by countries ○ anywhere
Alaska
Alabama
Arkansas
Arizona
California

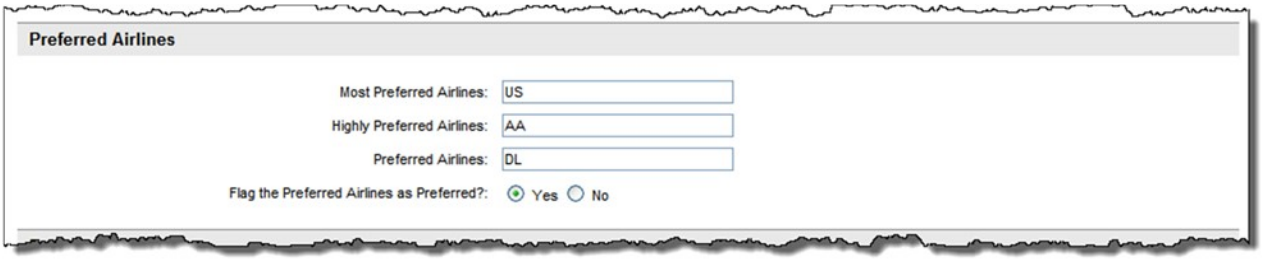
Bi-Directional: ● Yes ○ No

Through Location: ○ by airport codes ○ by states ● by countries ○ anywhere
Afghanistan
Albania
Algeria
American Samoa
Andorra
Current Selection is: United States

Preferred Airlines

    - **From Location:**
      - If *by airport codes* was selected, enter the airport codes separated by semi-colons
      - If *by states* was selected, select the state(s) from the drop down list
      - If *by countries* was selected, select the state(s) from the drop down list
      - If *anywhere* was selected, no additional selections are needed
    - **To Location:**
      - If *by airport codes* was selected, enter the airport codes separated by semi-colons
      - If *by states* was selected, select the state(s) from the drop down list
      - If *by countries* was selected, select the state(s) from the drop down list
      - If *anywhere* was selected, no additional selections are needed

        - **Bi-Directional:** Select *Yes* or *No*. Select if the preference will apply to both outbound and return flights.
        - **Through Location:**
            - If *by airport codes* was selected, enter the airport codes separated by semi-colons
            - If *by states* was selected, select the state(s) from the drop down list
            - If *by countries* was selected, select the state(s) from the drop down list
            - If *anywhere* was selected, no additional selections are needed
    - **Preferred Airlines:**



Preferred Airlines

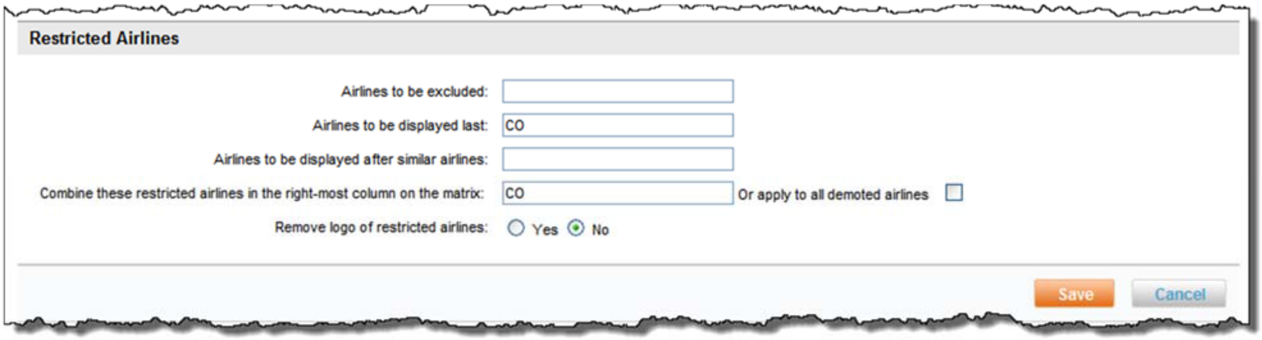
Most Preferred Airlines: US

Highly Preferred Airlines: AA

Preferred Airlines: DL

Flag the Preferred Airlines as Preferred?: ● Yes ○ No

- **Most Preferred Airlines:** List the airline codes to have them displayed at the top of the search results page separated by commas.
- **Highly Preferred Airlines:** List the airline codes to have them displayed under the most preferred airlines at the top of the search results page.
- **Preferred Airlines:** List the airline codes to have them displayed under the highly preferred airlines at the top of the search results page.
- **Flag the Preferred Airlines as Preferred:** If *Yes* is selected, the search results will be displayed as outlined above (Most Preferred followed by Highly Preferred and then Preferred Airlines) and a gold icon or medallion with a P will be displayed beside the flight information. Hover over the P, to see PPP to designate this as a Most Preferred Airline, PP to designate this as a Highly Preferred Airline or P to designate this as a Preferred Airline.



Restricted Airlines

Airlines to be excluded:

Airlines to be displayed last: CO

Airlines to be displayed after similar airlines:

Combine these restricted airlines in the right-most column on the matrix: CO Or apply to all demoted airlines ☐

Remove logo of restricted airlines: ○ Yes ● No

- **Restricted Airlines:**
    - **Airlines to be excluded:** Enter the airline codes whose search results will not be displayed regardless if they meet trip search criteria.
    - **Airlines to be displayed last:** Enter the airline codes for airlines whose search results will be displayed at the bottom of the list regardless if they would fall elsewhere in the list.
    - **Airlines to be displayed after similar airlines:** Enter the airline codes for airlines whose search results will be displayed with other entries if the results are similar to those entries.

- **Combine these restricted airlines in the right-most column on the matrix:** Enter a list of airline codes, or select the **Or apply to all demoted airlines** checkbox to display all restricted airline codes in a column on the right regardless if they fall into another column.

Note: If airline codes are entered in this field, they must also be listed in either the **Airlines to be displayed after similar airlines** or the **Airlines to be displayed last** fields.

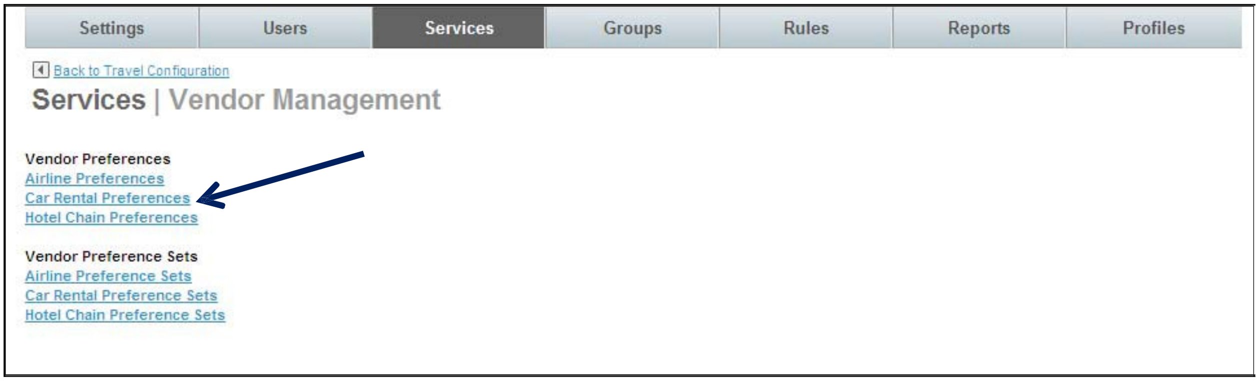
- **Remove logo of restricted airlines:** Select *Yes* or *No* from the drop down list to not display the logo of a restricted airline beside search results for that airline.

4. Click the **Save** to save the new airline preference.

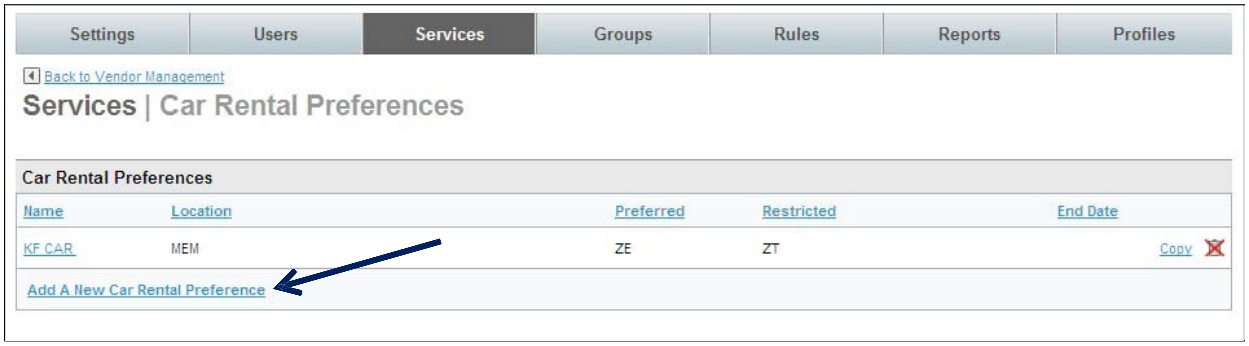
Note: Don't forget to add the list to a set – Vendor Preference Sets are discussed later in this chapter.

1.2.1.2 Car Rental Preferences

1. Click the **Car Rental Preferences** link.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Configuration
Services | Vendor Management
Vendor Preferences
Airline Preferences
Car Rental Preferences
Hotel Chain Preferences
Vendor Preference Sets
Airline Preference Sets
Car Rental Preference Sets
Hotel Chain Preference Sets

2. The **Services | Car Rental Preferences** page is displayed. Click the **Add A New Car Rental Preference** link to add a new preference, or click an existing preference record to edit that record.

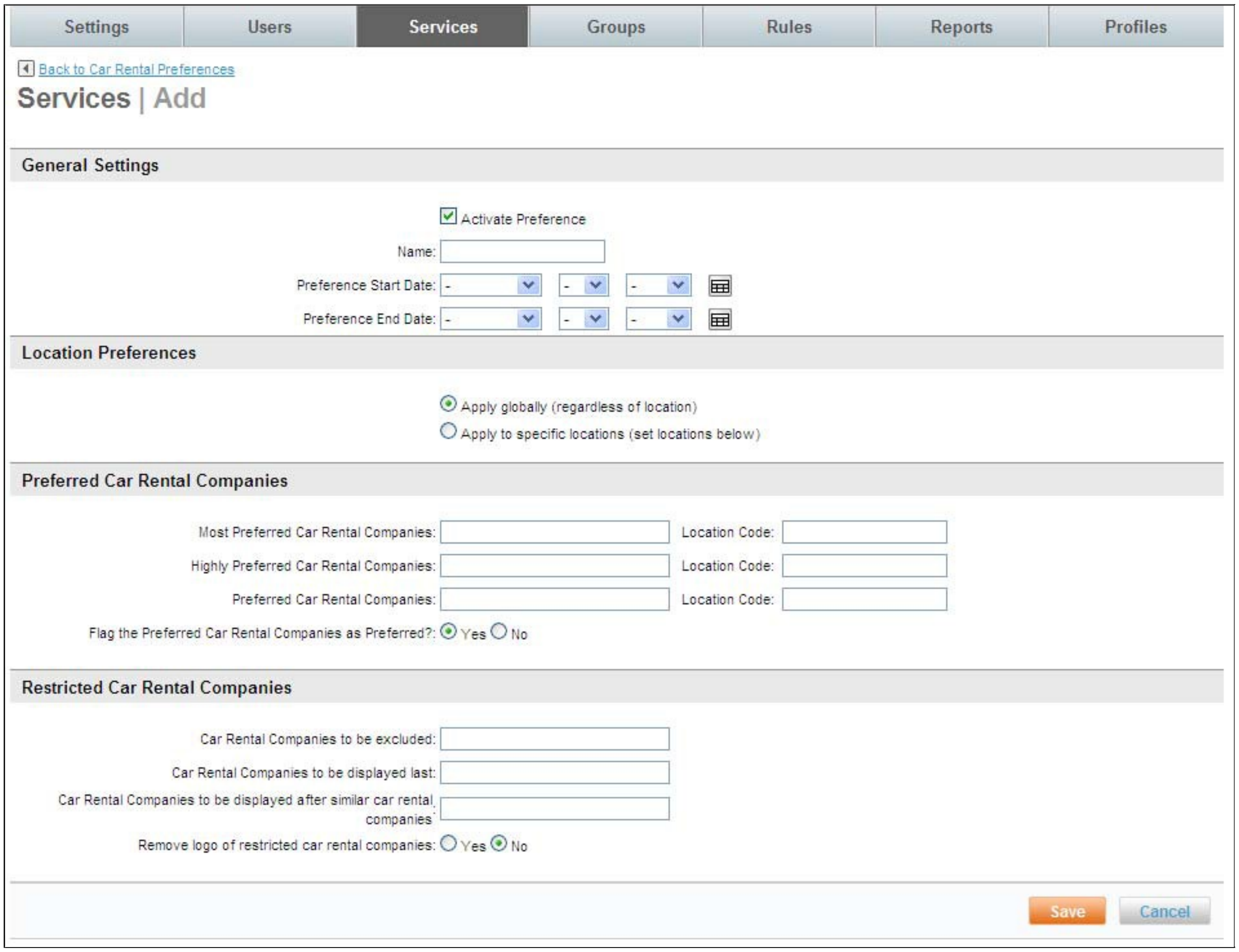

Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Vendor Management
Services | Car Rental Preferences

Car Rental Preferences

Name	Location	Preferred	Restricted	End Date	
KF CAR	MEM	ZE	ZT		Copy ☒

Add A New Car Rental Preference

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


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Car Rental Preferences
Services | Add
General Settings
Name:
Preference Start Date:
Preference End Date:
Location Preferences
Preferred Car Rental Companies
Most Preferred Car Rental Companies:
Location Code:
Highly Preferred Car Rental Companies:
Location Code:
Preferred Car Rental Companies:
Location Code:
Restricted Car Rental Companies
Car Rental Companies to be excluded:
Car Rental Companies to be displayed last:
Car Rental Companies to be displayed after similar car rental companies:
Save
Cancel

☑ Activate Preference

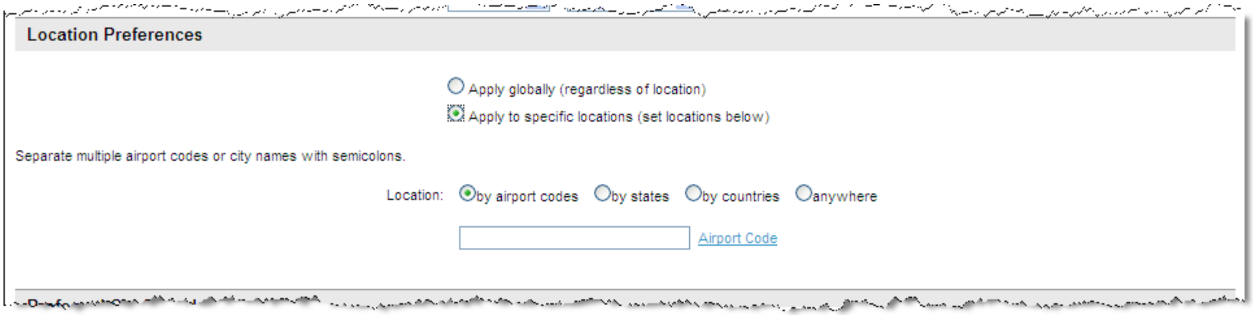
● Apply globally (regardless of location)
○ Apply to specific locations (set locations below)

Flag the Preferred Car Rental Companies as Preferred?: ● Yes ○ No

Remove logo of restricted car rental companies: ○ Yes ● No

- **Car Rental Preferences:**
  - **General Settings:**
    - **Activate Preference:** Select the checkbox to activate the preference.
    - **Name:** Name the car rental preference to help recognize the market to which it applies. An example is *DFW* to show that this car rental preference is for the market in Dallas.
    - **Preference 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 preference will not take effect upon the save of the record.
    - **Preference 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 preference has an anticipated end date.
  - **Location Preference:**
    - **Apply globally (regardless of location):** Select this radio button if the preference applies to all locations
    - **Apply to specific locations (set locations below):** Select this radio button if the preference applies to specific locations.
      - Separate multiple airport codes or city names with semicolons

- If *by airport codes* was selected, enter the airport codes separated by semi-colons



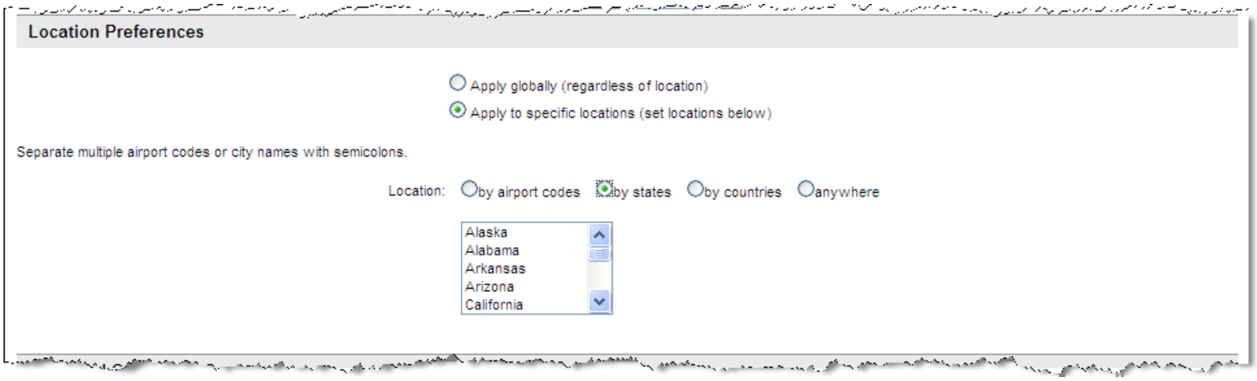
Location Preferences

○ Apply globally (regardless of location)
● Apply to specific locations (set locations below)

Separate multiple airport codes or city names with semicolons.

Location: ● by airport codes ○ by states ○ by countries ○ anywhere

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



Location Preferences

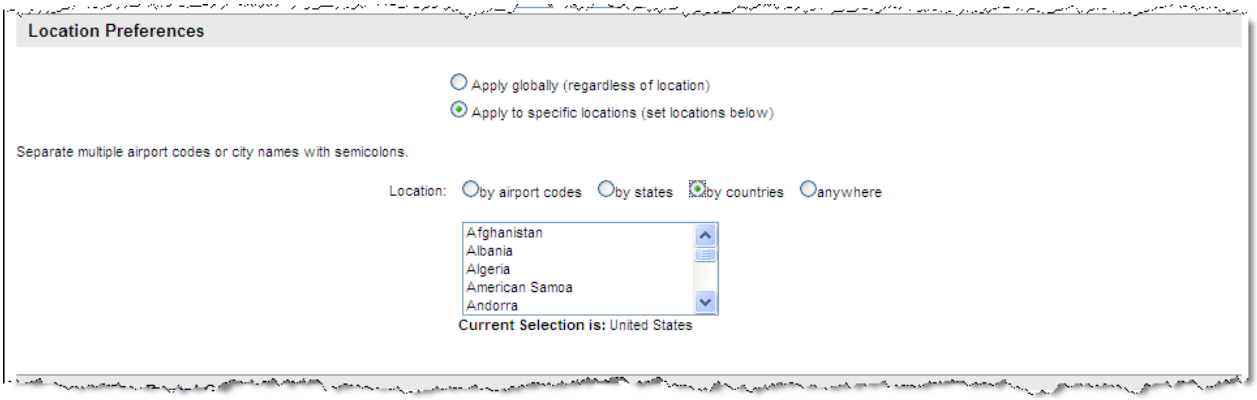
○ Apply globally (regardless of location)
● Apply to specific locations (set locations below)

Separate multiple airport codes or city names with semicolons.

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



Location Preferences

○ Apply globally (regardless of location)
● Apply to specific locations (set locations below)

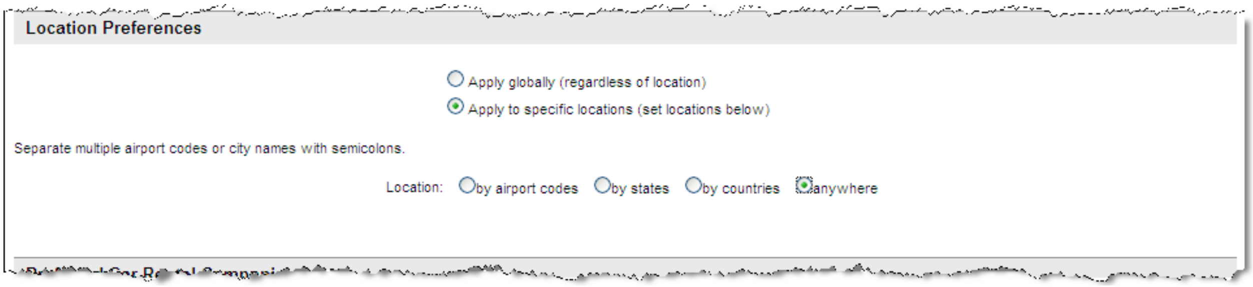
Separate multiple airport codes or city names with semicolons.

Location: ○ by airport codes ○ by states ● by countries ○ anywhere

Afghanistan
Albania
Algeria
American Samoa
Andorra

Current Selection is: United States

- If *anywhere* was selected, no additional selections are needed



Location Preferences

○ Apply globally (regardless of location)
● Apply to specific locations (set locations below)

Separate multiple airport codes or city names with semicolons.

Location: ○ by airport codes ○ by states ○ by countries ● anywhere

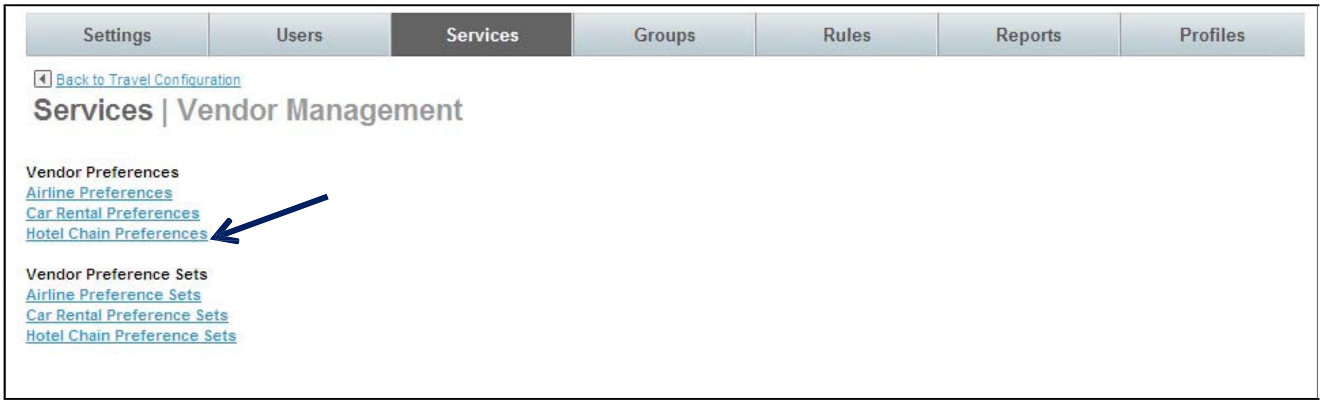
- **Preferred Car Rental Companies:**
  - **Most Preferred Car Rental Company / Location Code:** List the car rental company codes and location codes, if applicable, to have them displayed at the top of the search results page.
  - **Highly Preferred Car Rental Company / Location Code:** List the car rental company codes and location codes, if applicable, to have them displayed under the most preferred airlines at the top of the search results page.
  - **Preferred Car Rental Company / Location Code:** List the car rental company codes and location codes, if applicable, to have them displayed under the highly preferred airlines at the top of the search results page.
  - **Flag the Preferred Car Rental Companies as Preferred:** If *Yes* is selected, the search results will be displayed as outlined above (Most Preferred followed by Highly Preferred and then Preferred Car Rental Companies) and a gold icon or medallion with a P will be displayed beside the car rental company information. When hovering over the P, PPP designates this as a Most Preferred Car Rental Company, PP to designate this as a Highly Preferred Car Rental Company or P to designate this as a Preferred Car Rental Company.
- **Restricted Car Rental Companies:**
  - **Car Rental Companies to be excluded:** Enter the car rental company codes whose search results will not be displayed regardless if they meet trip search criteria.
  - **Car Rental Companies to be displayed last:** Enter the car rental company codes for car rental companies whose search results will be displayed at the bottom of the list regardless if they would fall elsewhere in the list.
  - **Car Rental Companies to be displayed after similar car rental companies:** Enter the car rental company codes for car rental companies whose search results will be displayed with other entries if the results are similar to those entries.
  - **Remove logo of restricted car rental companies:** Select *Yes* or *No* from the drop down list to not display the logo of a restricted car rental company beside search results for that car rental company.

4. Click the **Save** to save the new Car Rental Preference.

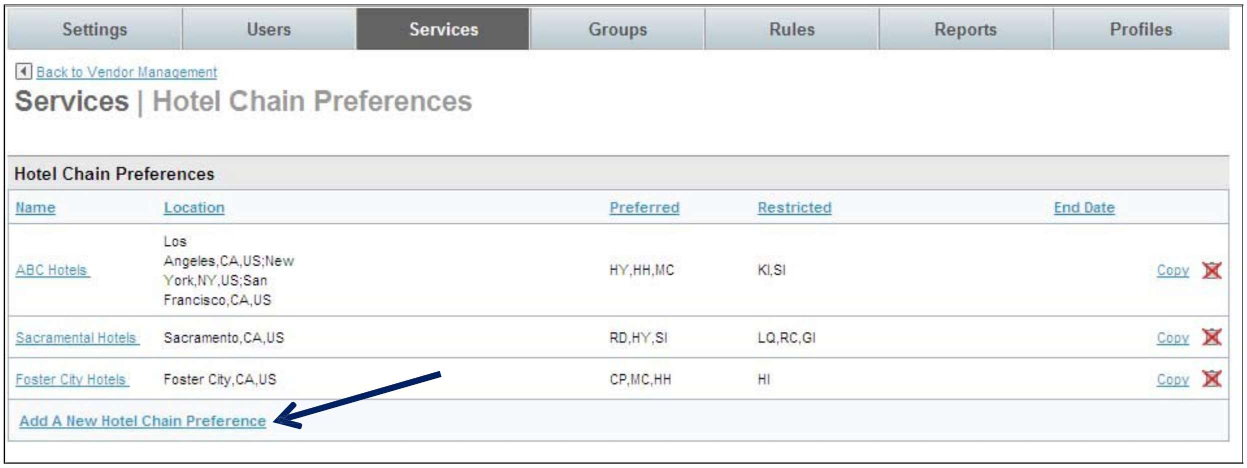
Note: Don't forget to add the list to a set – discussed later in this chapter.

1.2.1.3 Hotel Chain Preferences

1. Click the **Hotel Chain Preferences** link.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Configuration
Services | Vendor Management
Vendor Preferences
Airline Preferences
Car Rental Preferences
Hotel Chain Preferences
Vendor Preference Sets
Airline Preference Sets
Car Rental Preference Sets
Hotel Chain Preference Sets

2. The **Services** | **Hotel Chain Preferences** page is displayed. Click the **Add A New Hotel Chain Preference** link to add a new preference, or click an existing preference record to edit that record.



Back to Vendor Management

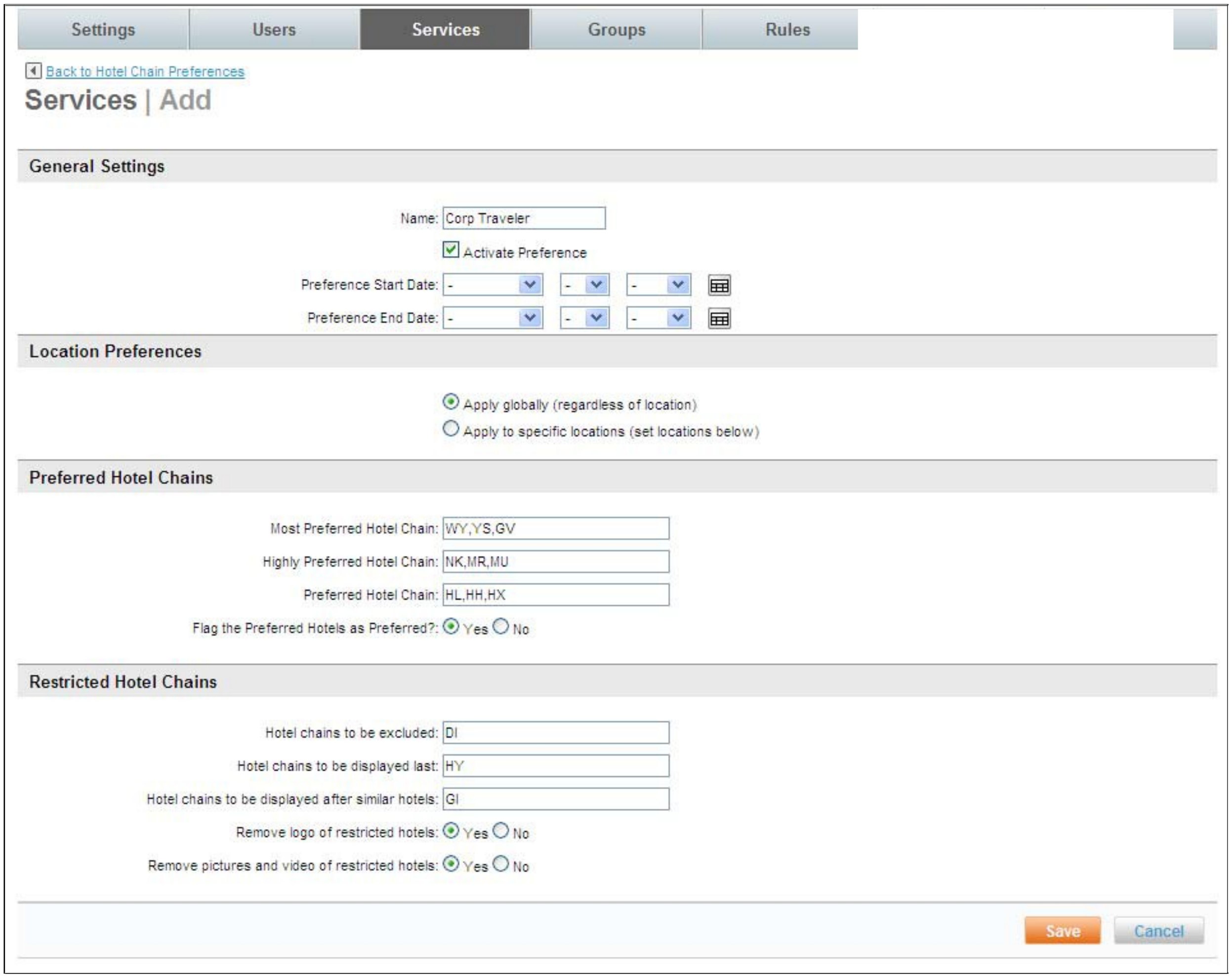
Services | Hotel Chain Preferences

Hotel Chain Preferences

Name	Location	Preferred	Restricted	End Date	
ABC Hotels	Los Angeles,CA,US;New York,NY,US;San Francisco,CA,US	HY,HH,MC	KI,SI		Copy
Sacramental Hotels	Sacramento,CA,US	RD,HY,SI	LQ,RC,GI		Copy
Foster City Hotels	Foster City,CA,US	CP,MC,HH	HI		Copy

Add A New Hotel Chain Preference

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



Back to Hotel Chain Preferences

Services | Add

General Settings

Name: Corp Traveler
☑ Activate Preference
Preference Start Date: - - -
Preference End Date: - - -

Location Preferences

● Apply globally (regardless of location)
○ Apply to specific locations (set locations below)

Preferred Hotel Chains

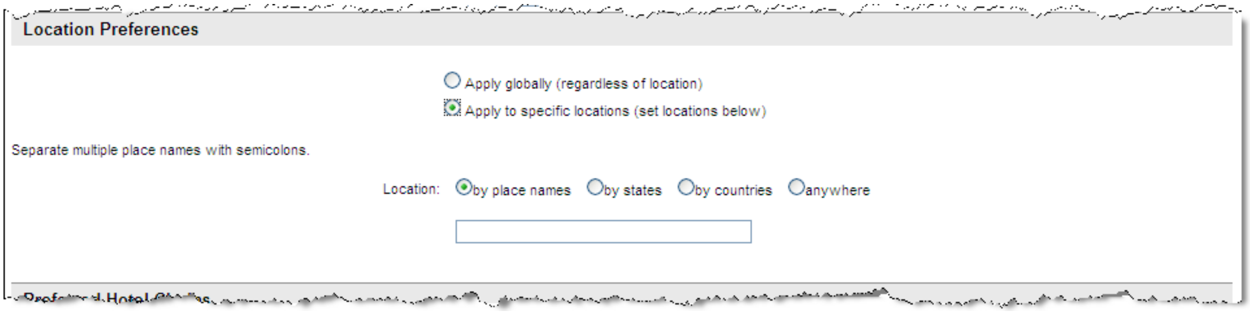
Most Preferred Hotel Chain: WY,YS,GV
Highly Preferred Hotel Chain: NK,MR,MU
Preferred Hotel Chain: HL,HH,HX
Flag the Preferred Hotels as Preferred?: ● Yes ○ No

Restricted Hotel Chains

Hotel chains to be excluded: DI
Hotel chains to be displayed last: HY
Hotel chains to be displayed after similar hotels: GI
Remove logo of restricted hotels: ● Yes ○ No
Remove pictures and video of restricted hotels: ● Yes ○ No

- **Hotel Chain Preferences:**
  - **General Settings:**
    - **Activate Preference:** Select the checkbox to activate the preference.

  - **Name:** Name the Hotel Chain preference to help recognize the market to which it applies. An example is *Dallas Hotel Preferences* to show that this hotel chain preference is for the market of Dallas.
  - **Preference 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 preference will not take effect upon the save of the record.
  - **Preference 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 preference has an anticipated end date.
- **Location Preference:**
  - **Apply globally (regardless of location):** Select this radio button if the preference applies to all locations
  - **Apply to specific locations (set locations below):** Select this radio button if the preference applies to specified locations.
    - Separate multiple place names with semicolons.
    - Location:
      - If *by place names* was selected, enter the cities, states and countries separated by semi-colons. An example: *Sacramento, CA, US;San Francisco, CA, US.*



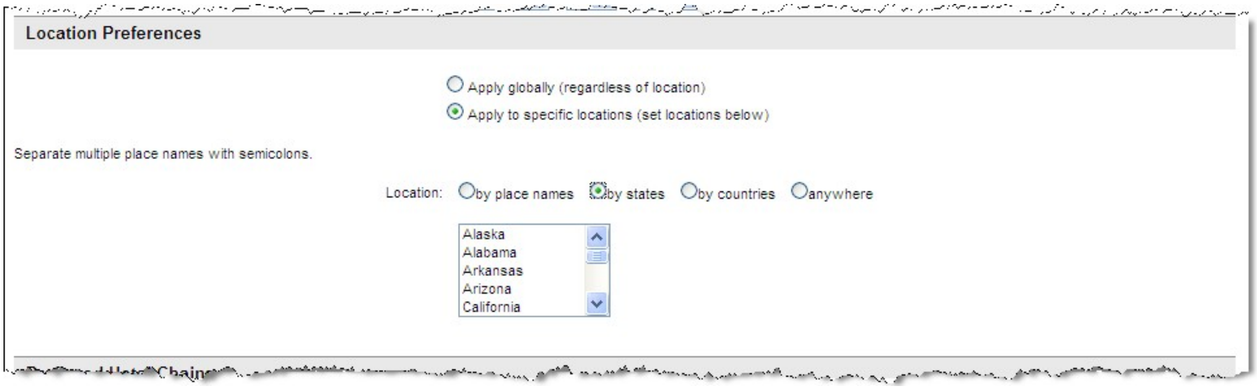
Location Preferences

○ Apply globally (regardless of location)
● Apply to specific locations (set locations below)

Separate multiple place names with semicolons.

Location: ● by place names ○ by states ○ by countries ○ anywhere

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



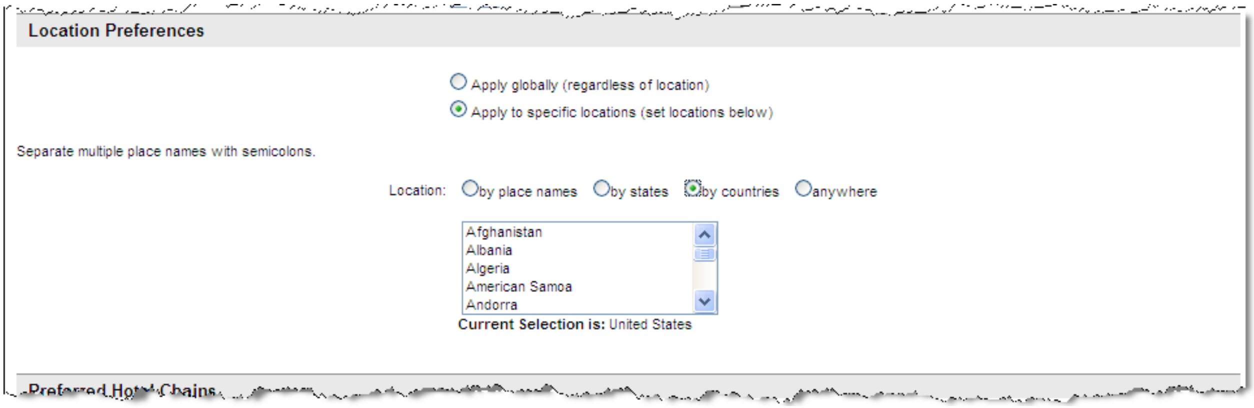
Location Preferences

○ Apply globally (regardless of location)
● Apply to specific locations (set locations below)

Separate multiple place names with semicolons.

Location: ○ by place names ● by states ○ by countries ○ anywhere

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



Location Preferences

○ Apply globally (regardless of location)
● Apply to specific locations (set locations below)

Separate multiple place names with semicolons.

Location: ○by place names ○by states ●by countries ○anywhere

Afghanistan
Albania
Algeria
American Samoa
Andorra

Current Selection is: United States

Preferred Hotel Chains

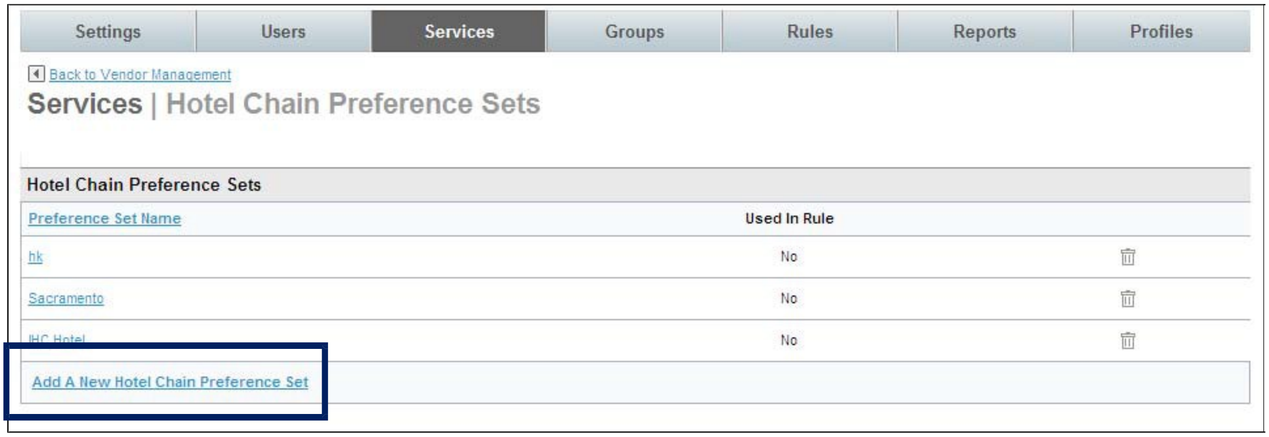
- If *anywhere* was selected, no additional selections are needed

- **Preferred Hotel Chains:**
  - **Most Preferred Hotel Chain:** List the hotel chain codes to have them displayed on the search results page. PREFERRED will be placed beside this entry and when hovering over the label, a box describing this property as a Most Preferred Hotel Chain is displayed.
  - **Highly Preferred Hotel Chain:** List the hotel chain codes to have them displayed on the search results page. PREFERRED will be placed beside this entry and when hovering over the label, a box describing this property as a Highly Preferred Hotel Chain is displayed.
  - **Preferred Hotel Chain:** List the hotel chain codes to have them displayed on the search results page. PREFERRED will be placed beside this entry and when hovering over the label, a box describing this property as a Preferred Hotel Chain is displayed.
  - **Flag the Preferred Hotels as Preferred:** If *Yes* is selected, the search results will be displayed as outlined above (Most Preferred followed by Highly Preferred and then Preferred Hotels) and PREFERRED will be displayed beside the hotel chain information. When hovering over the label, a box describing this as a Most Preferred Hotel Chain, Highly Preferred Hotel Chain or Preferred Hotel Chain is displayed.
- **Restricted Hotel Chains:**
  - **Hotel Chains to be excluded:** Enter the hotel chain codes whose search results will not be displayed regardless if they meet trip search criteria.
  - **Hotel Chains to be displayed last:** Enter the hotel chain codes for hotel chains whose search results will be displayed at the bottom of the list regardless if they would fall elsewhere in the list.
  - **Hotel Chains to be displayed after similar hotels:** Enter the hotel chain codes for hotel chains whose search results will be displayed with other entries if the results are similar to those entries.
  - **Remove logo of restricted hotels:** Select *Yes* or *No* from the drop down list to not display the logo of restricted hotels.
  - **Remove pictures and video of restricted hotels:** Select *Yes* or *No* from the drop down list to not display any pictures or videos from a restricted hotel.

4. Click the **Save** to save the preferences. Click the **Back to Vendor Management** link to return to the **Vendor Management** page.

1.2.2 Vendor Management Sets

1. Click the **Vendor Preference Sets** link to add the Preference list to a set. Select the appropriate vendor type's link.
2. The Services | (Airline, Car Rental or Hotel Chain) Preference Sets page is displayed. Click the Add A New (Airline, Car Rental or Hotel Chain) Preference Set link to add a new set, or click an existing set record to edit that record.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Vendor Management

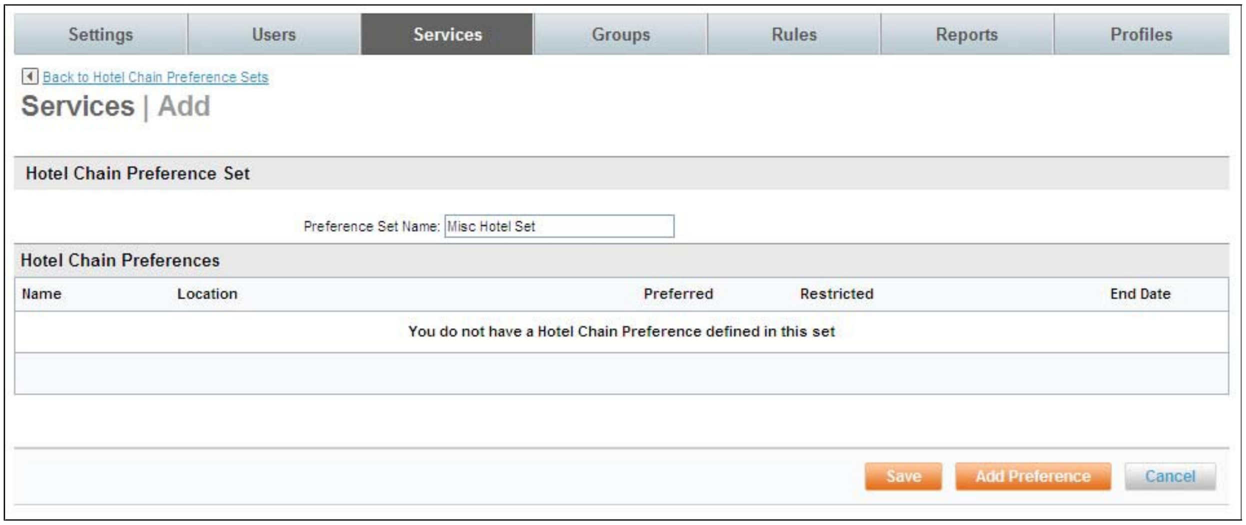
Services | Hotel Chain Preference Sets

Hotel Chain Preference Sets

Preference Set Name	Used In Rule
hk	No
Sacramento	No
IHC Hotel	No

Add A New Hotel Chain Preference Set

3. The (Airline, Car Rental or Hotel Chain) Preference Set page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Hotel Chain Preference Sets

Services | Add

Hotel Chain Preference Set

Preference Set Name: Misc Hotel Set

Hotel Chain Preferences

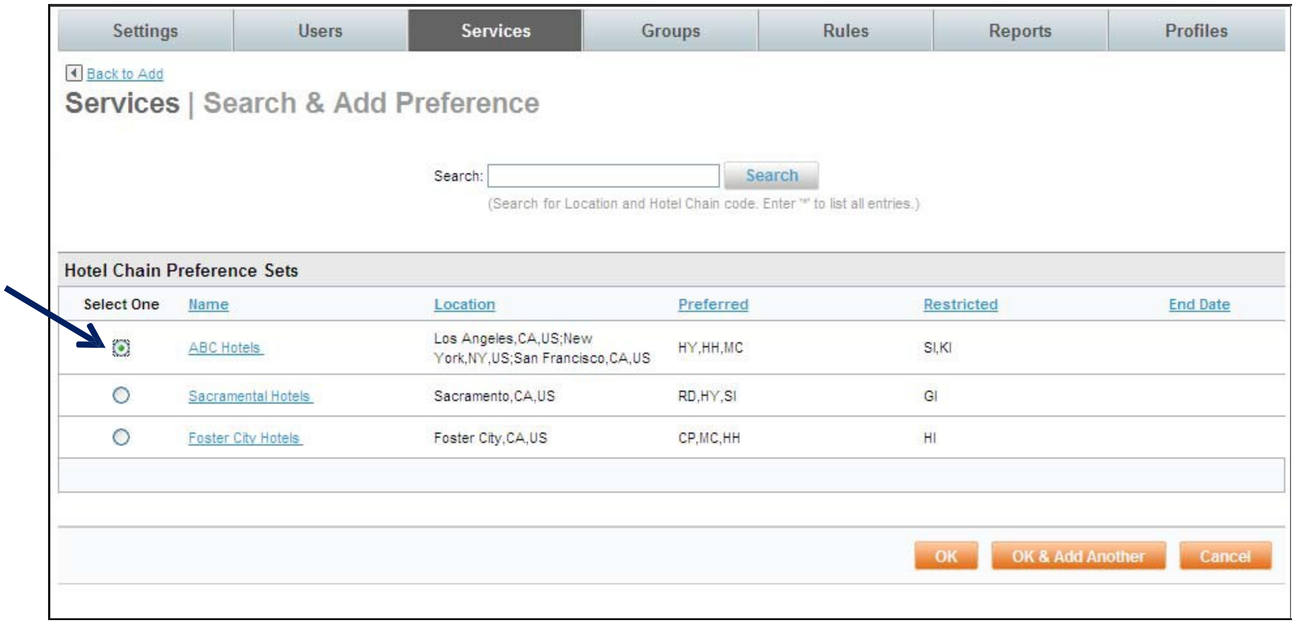
Name	Location	Preferred	Restricted	End Date

You do not have a Hotel Chain Preference defined in this set

Save
Add Preference
Cancel

- **Set Name:** Name the Preference Set. This name should be easily recognizable as a specific Preference Set configuration. An example is *AA Global Preferred* or *DFW Preferred Hotel Preferences*.

4. Click the **Add Preference** button. The **Services | Search & Add Preference** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Add
Services | Search & Add Preference
Search:
Search
(Search for Location and Hotel Chain code. Enter "*" to list all entries.)
Hotel Chain Preference Sets
OK
OK & Add Another
Cancel

Select One	Name	Location	Preferred	Restricted	End Date
●	ABC Hotels	Los Angeles,CA,US;New York,NY,US;San Francisco,CA,US	HY,HH,MC	SI,KI	
○	Sacramental Hotels	Sacramento,CA,US	RD,HY,SI	GI	
○	Foster City Hotels	Foster City,CA,US	CP,MC,HH	HI	

5. Select the radio button beside the Preference List name to add it to the set. 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 **Save** to save the preferences in the set.
6. Click the **"_ changes not applied"** link to review the changes.
7. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.

2 Rules and Groups

A user's access to services and other options is determined by the groups to which the user belongs. If a user belongs to more than one group, the group with the lowest priority number (the one appearing closest to the top of the list) is selected to govern the access and options available to the user. By default, if a user is not included in another group with a higher priority or if no other groups are added to rules, the user will follow the rules established for the **Everyone Group**.

Groups are prioritized to decide which rule will be applied if a user is a member of more than one group. The **Priority** column is found to the left of each **Group** whose rules are defined on the Rules tab. The lower the priority number (located at the top of the list), the higher the rule priority this group will have. The rule with the lowest priority will be applied to members of the group.

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

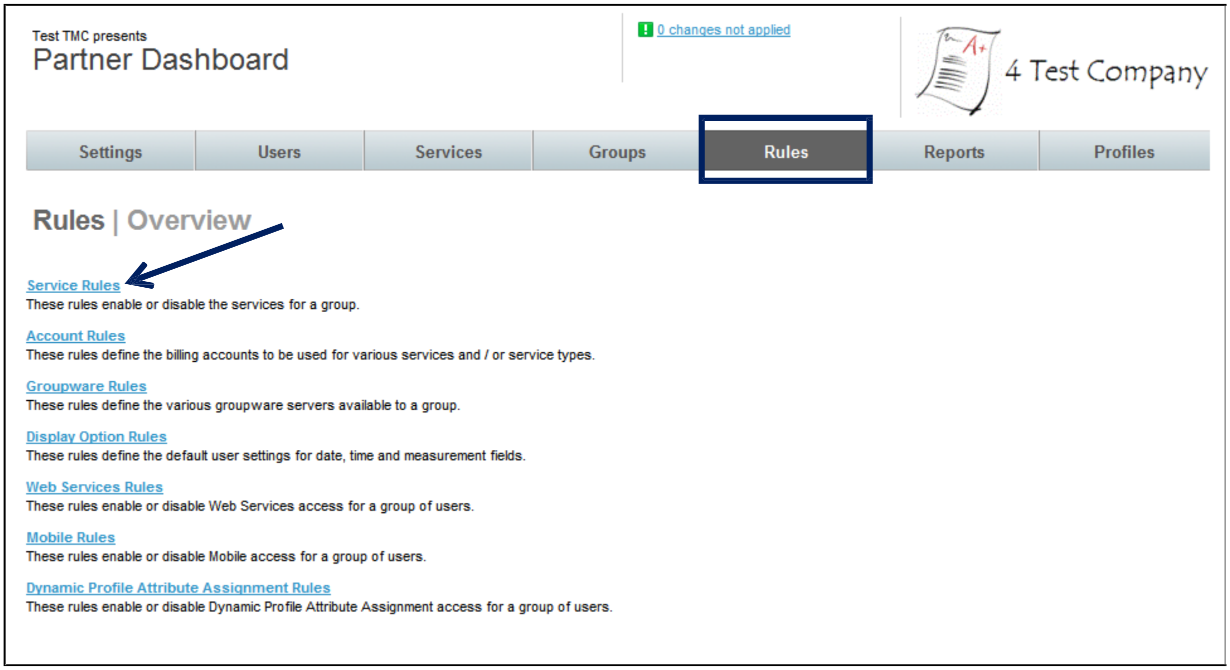
2.1 Rules Tab

The Deem Dashboard Service Rules Tab is where to establish the rules engaged when a user is viewing and booking Travel (Air, Car and Hotel) and other services such as Conferencing, Shipping, and Dining.

In an earlier Basic Dashboard Training module Configuration and Policy settings for Services were discussed. Here, enforcement of different rules for different user groups will be learned. The point to keep in mind is that a user can belong to more than one group. The lower the priority number of the rule (closest to the top of the list) governs what rule to apply to the user.

To configure **Service Rules**:

1. Access the Deem Travel Partner Dashboard using the User Name and Password with Users Tab permissions.
2. The **Partner Dashboard Æ Sites** | **Overview** page is displayed. Select the site by clicking the **Settings** link beside the site.
3. The **Settings** tab page is displayed. Click the **Rules** tab to access the different types of rules available on the dashboard.
4. The **Rules** tab page is displayed.



Rules | Overview

Service Rules
These rules enable or disable the services for a group.

Account Rules
These rules define the billing accounts to be used for various services and / or service types.

Groupware Rules
These rules define the various groupware servers available to a group.

Display Option Rules
These rules define the default user settings for date, time and measurement fields.

Web Services Rules
These rules enable or disable Web Services access for a group of users.

Mobile Rules
These rules enable or disable Mobile access for a group of users.

Dynamic Profile Attribute Assignment Rules
These rules enable or disable Dynamic Profile Attribute Assignment access for a group of users.

ServiceRules: These rules enable or disable the services for a group.

AccountRules: These rules define the billing accounts to be used for various services and / or service types.

GroupwareRules: These rules define the various groupware servers available to a group. Display

OptionRules: These rules define the default user settings for date, time and measurement fields.

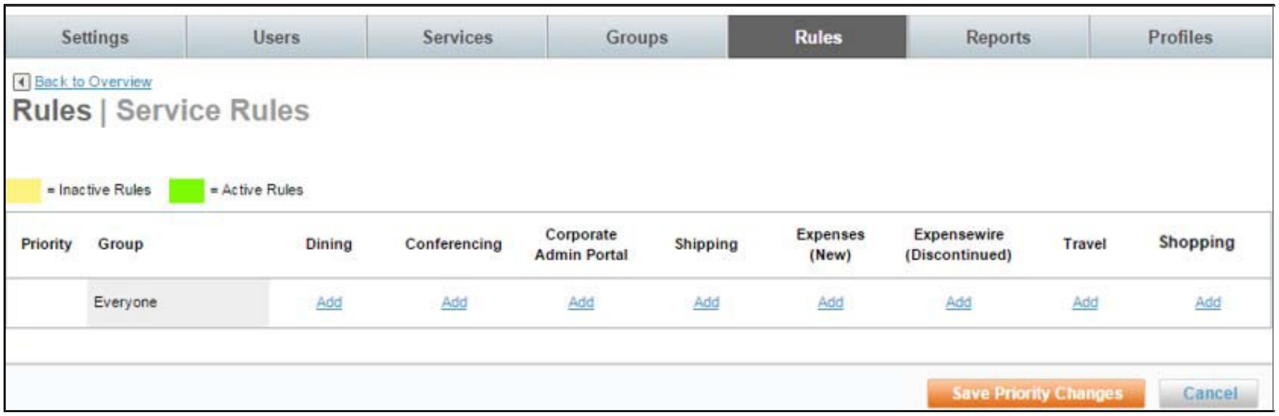
WebServicesRules: These rules enable or disable Web Services access for a group of users. Mobile

Rules: These rules enable or disable Mobile access for a group of users. DynamicProfileAttribute

AssignmentRules: These rules enable or disable Dynamic Profile Attribute Assignment access for a group of users.

5. Click the **Service Rules** link to enable service rules. The **Rules** | **Services Rules** page is displayed. Several different service rules can be configured on the page:

Note: Only contracted services will appear on the page. If interested in additional services, please contact your Account Management team member.



Rules | Service Rules

🟨 = Inactive Rules 🟩 = Active Rules

Priority	Group	Dining	Conferencing	Corporate Admin Portal	Shipping	Expenses (New)	Expensewire (Discontinued)	Travel	Shopping
	Everyone	Add	Add	Add	Add	Add	Add	Add	Add

Dining - Used to establish rules for groups enabling Dining

Conferencing - Used to establish rules for groups enabling Conferencing

CorporateAdminPortal – Used by the domain or corporate administrator to enable other contracted stores

Shipping – Used to establish rules for groups enabling our Package Shipping store

Expenses – Used to establish rules for groups enabling Expense

Travel - Used to establish rules for groups enabling Air, Hotel, Car, Airport Parking, and Car Service

Shopping – Used to establish rules for groups enabling Shopping.

Note: The order in which these columns appear may differ by site.

There are 3 possible values for each group within the **Service Rules** columns:

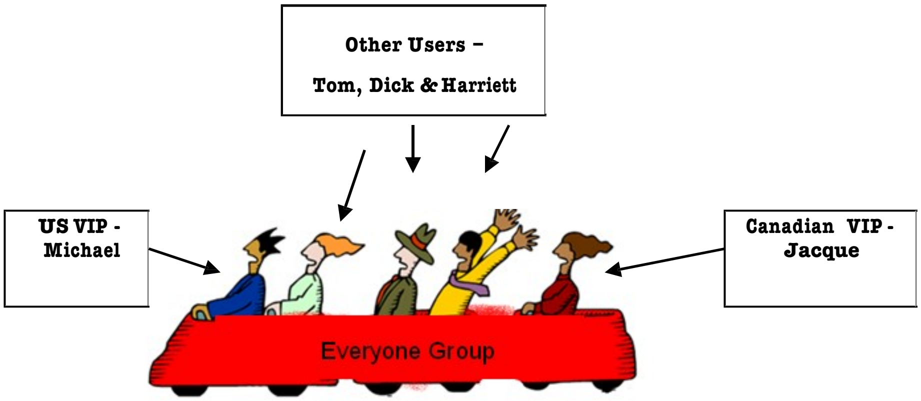
- **Add** link indicates there are currently no rules established for the group for the specific service
- **Edit** link with GREEN coloration indicates there are rules established for the group for the specific service and they are active
- **Edit** link with YELLOW coloration indicates there are rules established for the group for the specific service but they are inactive

2.1.1 Travel Rules for the Everyone Group

To enable Travel Rules, first determine if all users will use the same rules or if there are different rules for different groups of travelers or users. If everyone will follow the same rules, only add Travel Service Rules to the Everyone Group.

Think of the Everyone Group as a car with all users inside. Here we see a US VIP named Michael, a Canadian VIP named Jacque, and the other users named Tom, Dick and Harriett. For right now, they are all only in the Everyone Group. With only the Everyone Group defined, all users would follow the same rules – all or none would be allowed Conferencing or Dining, for example. All would be found to be out of policy if they selected First Class for International flights or all Pseudo-Cities and queue delivery options would be the same for all users unless we add additional groups and set parameters for their user definition.

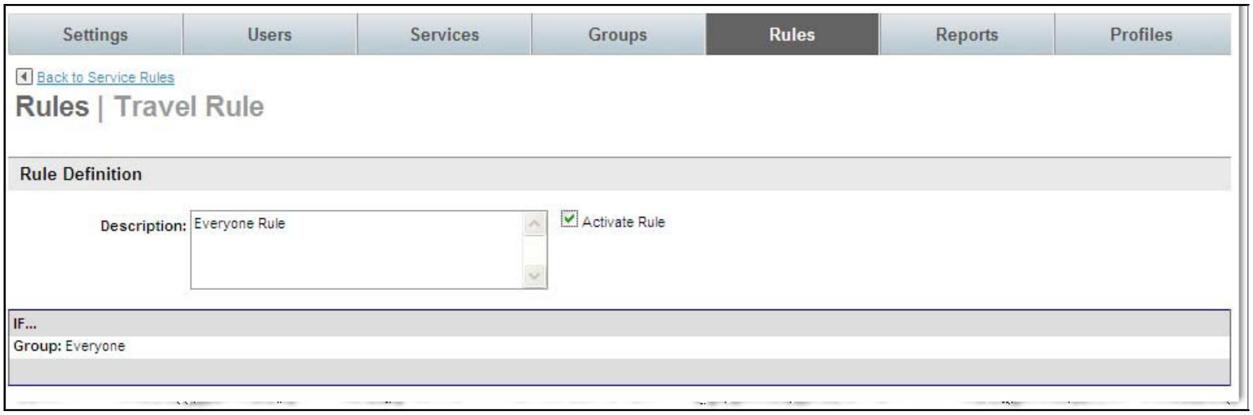
Important to Remember: - Users can belong to more than one group. Priorities govern which rule will be enforced.


Other Users –
Tom, Dick & Harriett
US VIP -
Michael
Canadian VIP -
Jacque
Everyone Group

If different users will follow different travel rules, VIP's for example, add other groups to define each unique set of users and then add Travel Service Rules to the appropriate group. We will discuss adding additional groups and establishing their rules later in this guide.

Let's first set up travel rules for the **Everyone Group** to see how it is done:

1. Click the **Add** or **Edit** link found in the **Travel** column for the Everyone Group. As noted above, the link found beside the Everyone Group may be either Add or Edit depending on if rules have previously been set up for the group.
2. The **Rules |Travel Rule** page is displayed. Enter a Rule **Description** that describes the intent of this rule and will be easily recognizable when it appears in a drop down list. Be sure to click the **Activate Rule** checkbox.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Service Rules

Rules | Travel Rule

Rule Definition

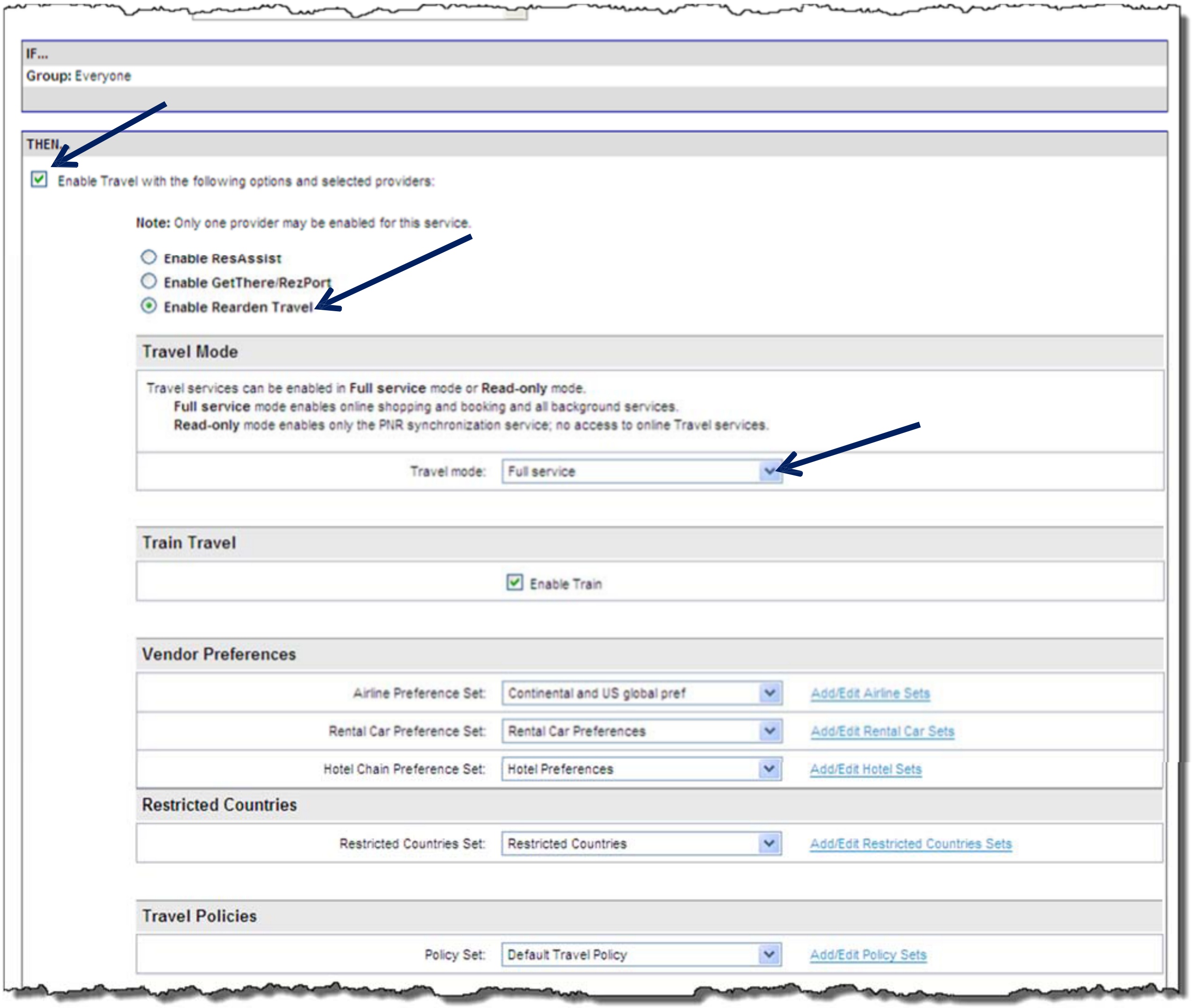
Description: Everyone Rule

☑ Activate Rule

IF...

Group: Everyone

3. Scroll down to the **THEN** section of the page. (Travel Mode through Travel Policy displayed here)



IF...
Group: Everyone

THEN

☑ Enable Travel with the following options and selected providers:

Note: Only one provider may be enabled for this service.

○ Enable ResAssist
○ Enable GetThere/RezPort
● Enable Rearden Travel

Travel Mode

Travel services can be enabled in **Full service** mode or **Read-only** mode.
Full service mode enables online shopping and booking and all background services.
Read-only mode enables only the PNR synchronization service; no access to online Travel services.

Travel mode: Full service

Train Travel

☑ Enable Train

Vendor Preferences

Airline Preference Set:	Continental and US global pref	Add/Edit Airline Sets
Rental Car Preference Set:	Rental Car Preferences	Add/Edit Rental Car Sets
Hotel Chain Preference Set:	Hotel Preferences	Add/Edit Hotel Sets

Restricted Countries

Restricted Countries Set:	Restricted Countries	Add/Edit Restricted Countries Sets

Travel Policies

Policy Set:	Default Travel Policy	Add/Edit Policy Sets

4. Click the **Enable Travel service with the following options and selected providers** checkbox and select the **Enable Rearden Travel** radio button.
5. Continue down the page:

x **Travel Mode:**
   - Select **Full service** from the drop down list if the rule is to include the travel store
   - Select **Read only** from the drop down list if the rule is for PNR Synchronization or the Mobile Store only with no travel

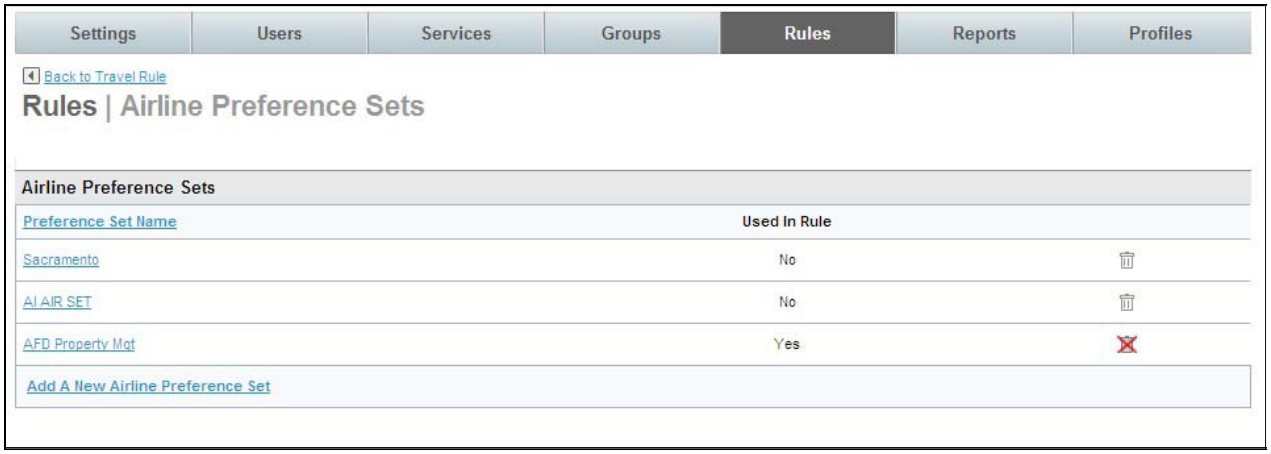
x **Enable Train**
   - Select **Enable Train** checkbox to enable train for this rule / Group.

x **Vendor Preferences:**

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Vendor Preferences discussion.

   - **Airline Preference Set:** Select the Airline Preference Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Airline Sets** link to go to the configuration page.

- The **Rules** | **Airline Preference Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

Rules | Airline Preference Sets

Airline Preference Sets

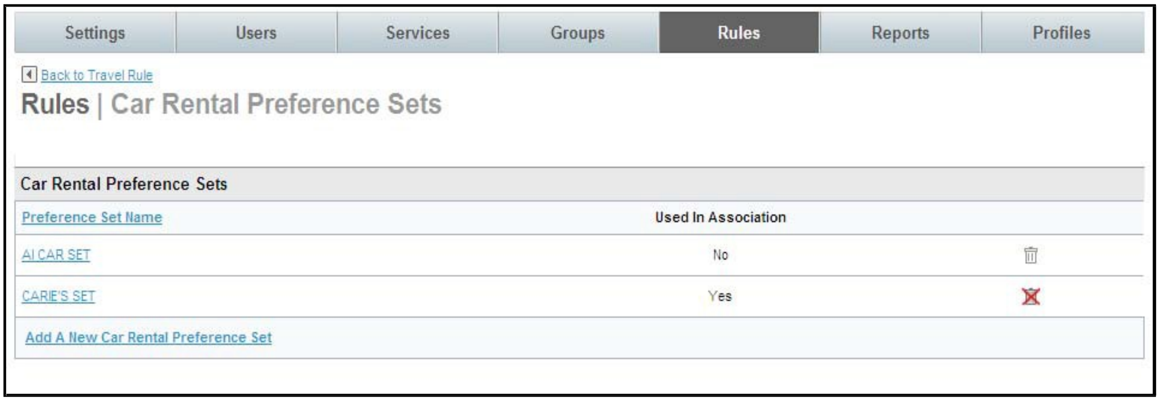
Preference Set Name	Used In Rule	
Sacramento	No	🗑
AI AIR SET	No	🗑
AFD Property Mgt	Yes	☒

Add A New Airline Preference Set

- Select the **Preference Set Name** link to review the set or click **Add A New Airline Preference Set** to add a new set.

○ **Rental Car Preference Set:** Select the Car Rental Preference Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Car Rental Sets** link to go to the configuration page.

- The **Rules** | **Car Rental Preference Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

Rules | Car Rental Preference Sets

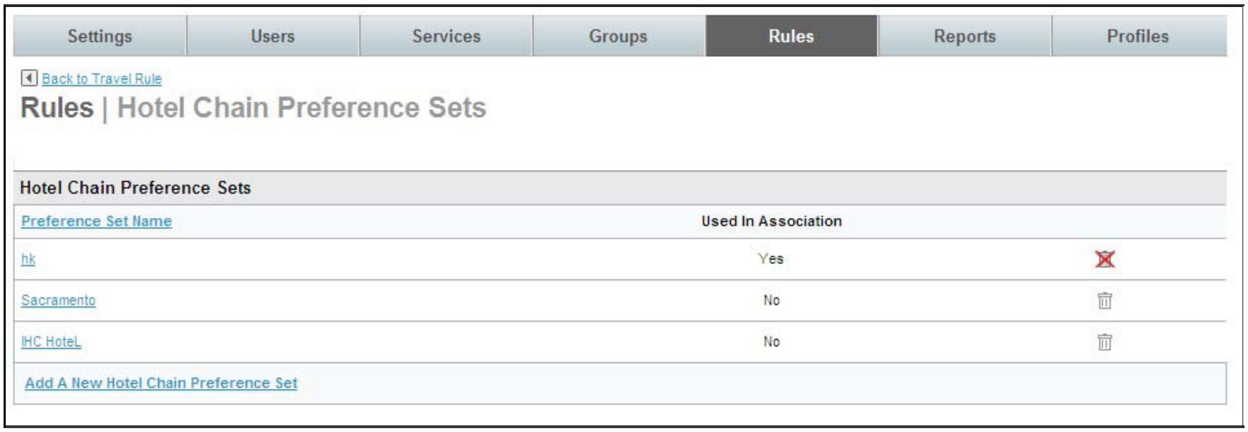
Car Rental Preference Sets

Preference Set Name	Used In Association	
AI CAR SET	No	🗑
CARIE'S SET	Yes	☒

Add A New Car Rental Preference Set

- Select the **Car Rental Preference Set Name** link to review the set or click **Add A New Car Rental Preference Set** to add a new set.

- **Hotel Chain Preference Set:** Select the Hotel Chain Preference Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Sets** link to go to the configuration page.
  - The **Rules | Hotel Chain Preference Sets** page is displayed.



Rules | Hotel Chain Preference Sets

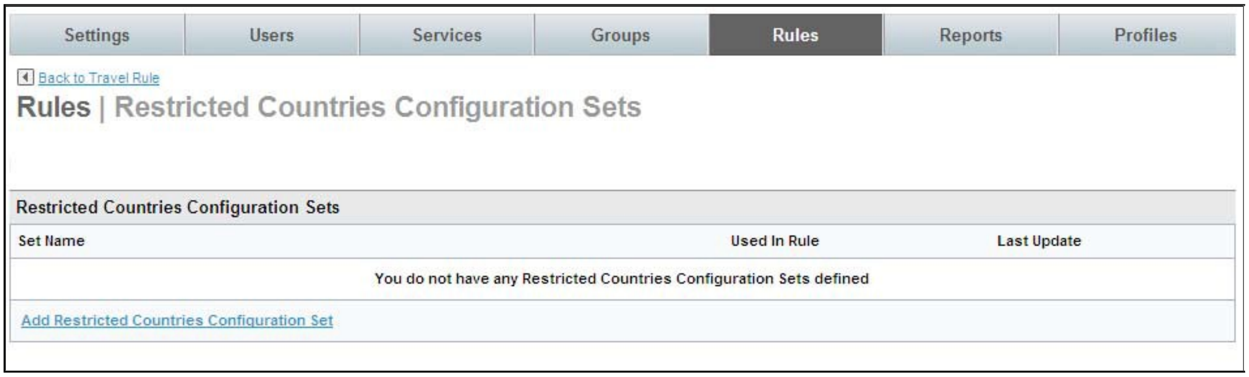
Hotel Chain Preference Sets

Preference Set Name	Used In Association	
hk	Yes	☒
Sacramento	No	🗑
IHC HoteL	No	🗑

Add A New Hotel Chain Preference Set

  - Select the **Hotel Preference Set Name** link to review the set or click **Add A New Hotel Chain Preference Set** to add a new set.

- **Restricted Countries Set:** Select the Restricted Countries Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Restricted Countries Sets** link to go to the configuration page.
  - The **Rules | Restricted Countries Configuration Sets** page is displayed.



Rules | Restricted Countries Configuration Sets

Restricted Countries Configuration Sets

Set Name	Used In Rule	Last Update
You do not have any Restricted Countries Configuration Sets defined		

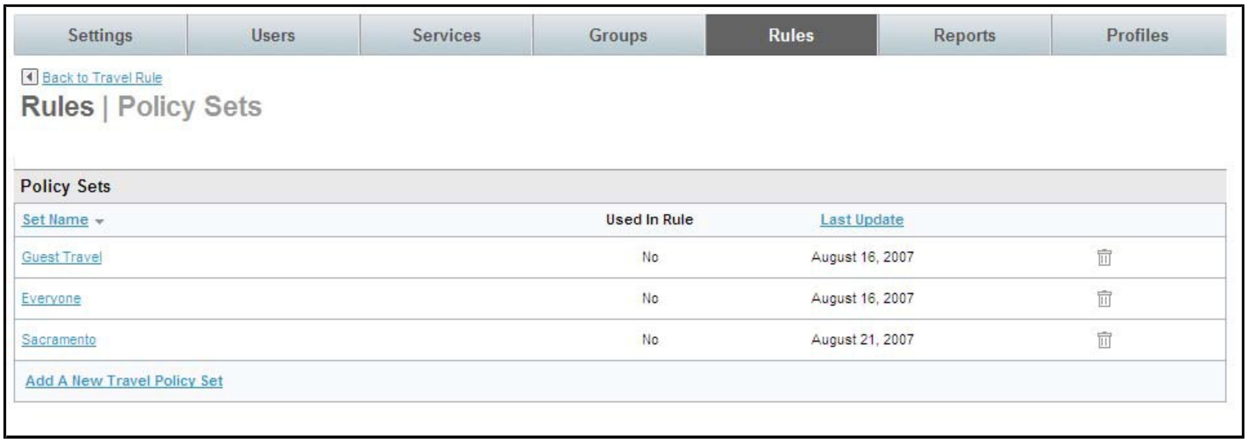
Add Restricted Countries Configuration Set

  - Select the **Restricted Countries Configuration Sets Name** link to review the set or click **Add Restricted Countries Configuration Set** to add a new set.

- **Travel Policies**:

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Travel Policies discussion.

- **Policy Set:** Select the Policy Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Policy Sets** link to go to the configuration page.
  - The **Rules | Policy Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

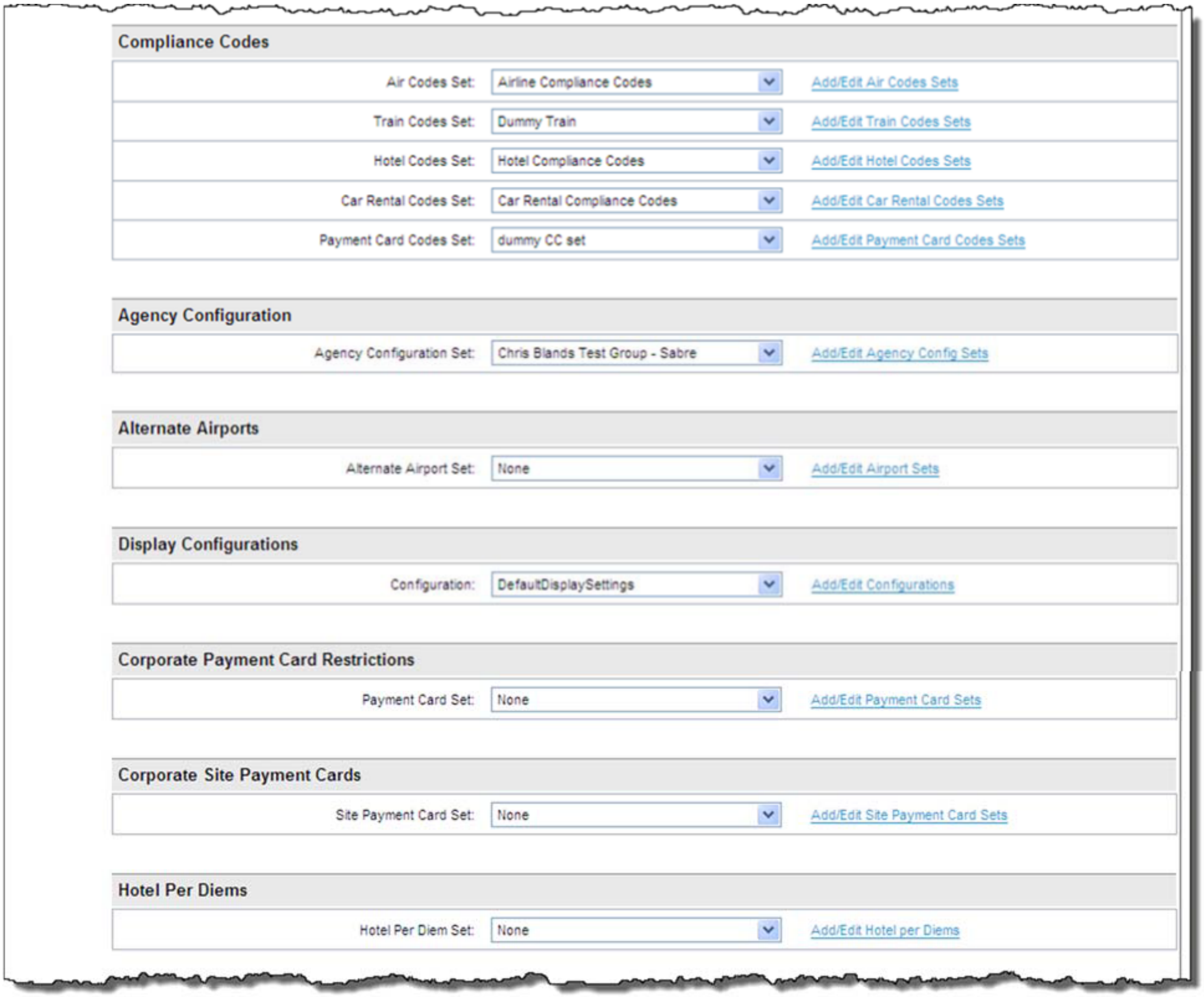
Rules | Policy Sets

Policy Sets

Set Name	Used In Rule	Last Update	
Guest Travel	No	August 16, 2007	🗑
Everyone	No	August 16, 2007	🗑
Sacramento	No	August 21, 2007	🗑
Add A New Travel Policy Set			

  - Select the **Policy Set Name** link to review the set or click **Add A New Travel Policy Set** to add a new set.

6. Scroll down further in the **THEN** section of the page. (Compliance Codes through Hotel Per Diems displayed)



Compliance Codes

Air Codes Set: Airline Compliance Codes

Train Codes Set: Dummy Train

Hotel Codes Set: Hotel Compliance Codes

Car Rental Codes Set: Car Rental Compliance Codes

Payment Card Codes Set: dummy CC set

Agency Configuration

Agency Configuration Set: Chris Blands Test Group - Sabre

Alternate Airports

Alternate Airport Set: None

Display Configurations

Configuration: DefaultDisplaySettings

Corporate Payment Card Restrictions

Payment Card Set: None

Corporate Site Payment Cards

Site Payment Card Set: None

Hotel Per Diems

Hotel Per Diem Set: None

Add/Edit Air Codes Sets
Add/Edit Train Codes Sets
Add/Edit Hotel Codes Sets
Add/Edit Car Rental Codes Sets
Add/Edit Payment Card Codes Sets
Add/Edit Agency Config Sets
Add/Edit Airport Sets
Add/Edit Configurations
Add/Edit Payment Card Sets
Add/Edit Site Payment Card Sets
Add/Edit Hotel per Diems

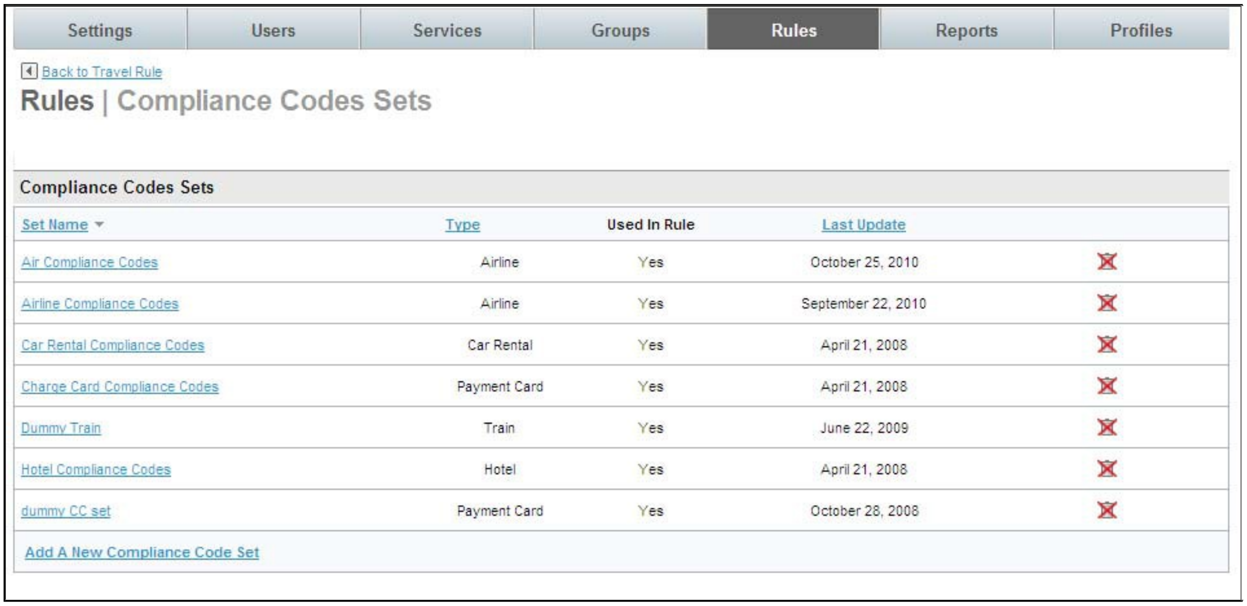
- **Compliance Codes**:

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Compliance Code discussion.

Note: Please note that all compliance codes are displayed when any of the links are selected in this section. Be sure to select the appropriate code for the element being worked.

  - **Air Codes Set:** Select the Air Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Air Codes Sets** link to go to the configuration page where compliance codes can be added as needed.

- The **Rules | Compliance Codes Sets** page is displayed.



Rules | Compliance Codes Sets

Compliance Codes Sets

Set Name	Type	Used In Rule	Last Update	
Air Compliance Codes	Airline	Yes	October 25, 2010	☒
Airline Compliance Codes	Airline	Yes	September 22, 2010	☒
Car Rental Compliance Codes	Car Rental	Yes	April 21, 2008	☒
Charge Card Compliance Codes	Payment Card	Yes	April 21, 2008	☒
Dummy Train	Train	Yes	June 22, 2009	☒
Hotel Compliance Codes	Hotel	Yes	April 21, 2008	☒
dummy CC set	Payment Card	Yes	October 28, 2008	☒

Add A New Compliance Code Set

- Select the **Set Name** link to review the set or click **Add A New Compliance Code Set** to add a new set.

○ **Train Codes Set:** Select the Train Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Codes Sets** link to go to the configuration page. (See screen shot above for all Compliance Code sets.)

○ **Hotel Codes Set:** Select the Hotel Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Codes Sets** link to go to the configuration page. (See screen shot above for all Compliance Code sets.)

○ **Car Rental Codes Set:** Select the Car Rental Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Car Rental Codes Sets** link to go to the configuration page. (See screen shot above for all Compliance Code sets.)

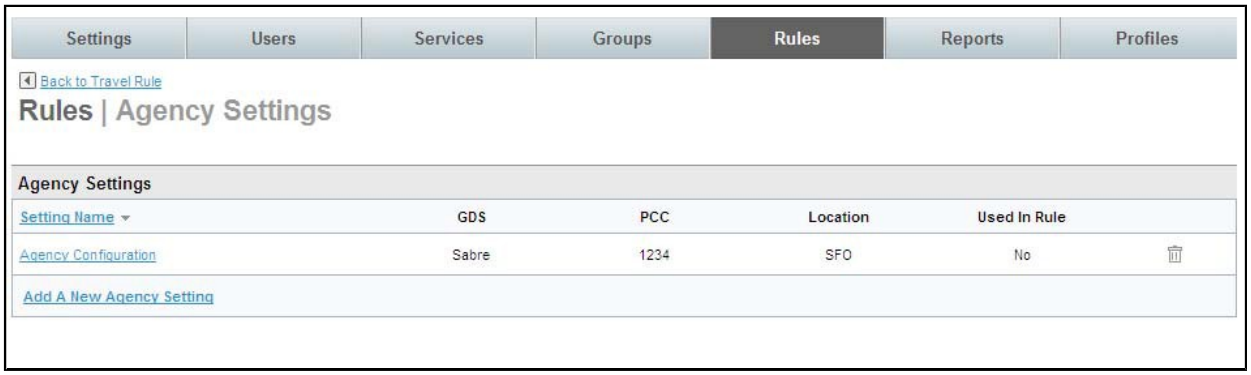
○ **Payment Card Codes Set:** Select the Payment Card Codes Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Payment Card Codes Sets** link to go to the configuration page. (See screen shot above for all Compliance Code sets.)

x **Agency Configuration**:

Note: Please refer to *Module 2: Travel (Part One)* for an Agency Configuration discussion.

○ **Agency Configuration Set:** Select the Agency Configuration Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Agency Configuration Sets** link to go to the configuration page.

- The **Rules | Agency Settings** page is displayed.



Rules | Agency Settings

Agency Settings

Setting Name	GDS	PCC	Location	Used In Rule	
Agency Configuration	Sabre	1234	SFO	No	🗑

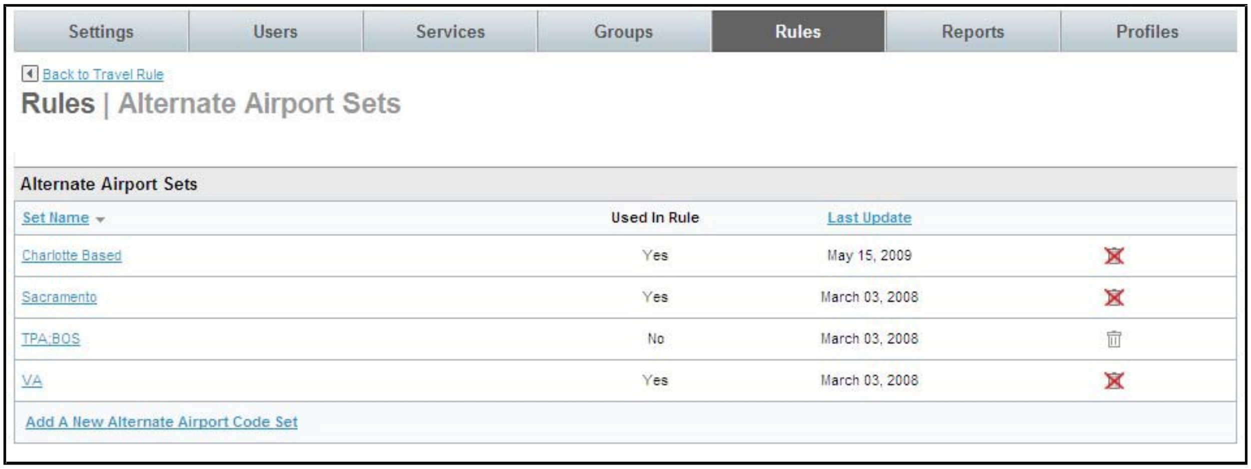
Add A New Agency Setting

- Select the **Setting Name** link to review the set or click **Add A New Agency Setting** to add a new set.

- **Alternate Airports**:

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Alternate Airport discussion.

  - **Alternate Airport Set:** Select the Alternate Airport Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Airport Sets** link to go to the configuration page.
    - The **Rules | Alternate Airport Sets** page is displayed.



Rules | Alternate Airport Sets

Alternate Airport Sets

Set Name	Used In Rule	Last Update	
Charlotte Based	Yes	May 15, 2009	✖
Sacramento	Yes	March 03, 2008	✖
TPA:BOS	No	March 03, 2008	🗑
VA	Yes	March 03, 2008	✖

Add A New Alternate Airport Code Set

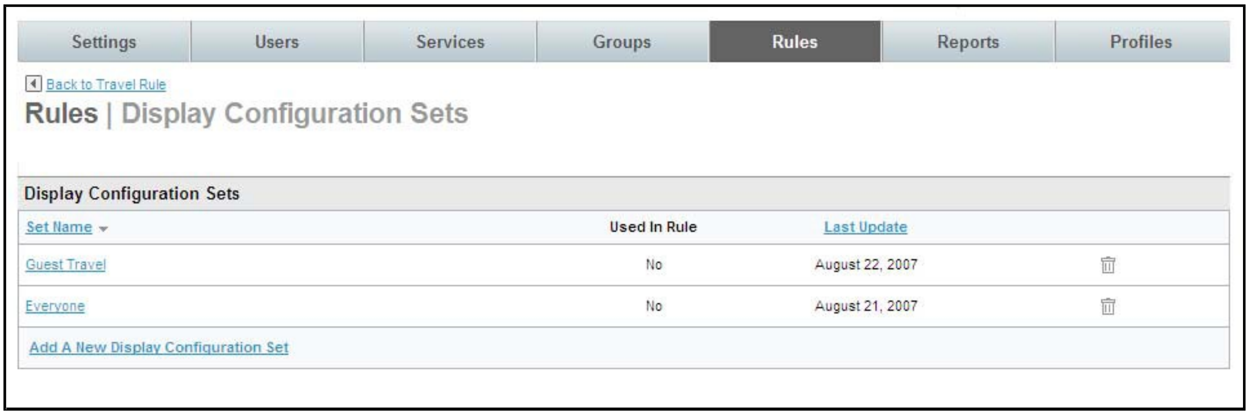
- Select the **Set Name** link to review the set or click **Add A New Alternate Airport Code Set** to add a new set.

- **Display Configuration**:

Note: Please refer to *Module 2: Travel (Part One)* for Display Configuration discussion.

  - **Configuration:** Select the Configuration previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Configurations** link to go to the configuration page.

- The **Rules | Display Configuration Sets** page is displayed.



Rules | Display Configuration Sets

Display Configuration Sets

Set Name	Used In Rule	Last Update
Guest Travel	No	August 22, 2007
Everyone	No	August 21, 2007

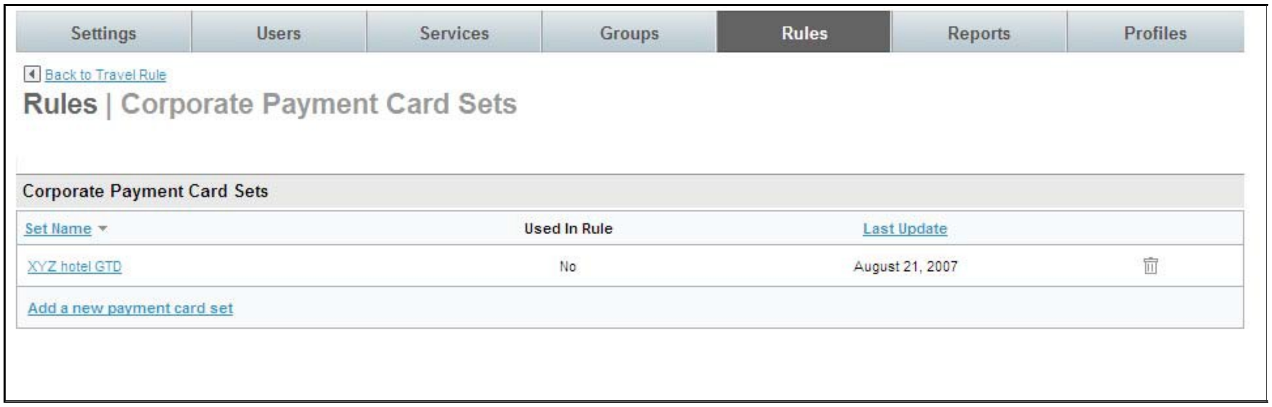
Add A New Display Configuration Set

- Select the **Set Name** link to review the set or click **Add A New Display Configuration Set** to add a new set.

x **Corporate Payment Card Restrictions**:

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Corporate Payment Card discussion.

- ○ **Payment Card Set:** Select the Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Payment Card Sets** link to go to the configuration page.
  - The **Rules | Corporate Payment Card Sets** page is displayed.



Rules | Corporate Payment Card Sets

Corporate Payment Card Sets

Set Name	Used In Rule	Last Update
XYZ hotel GTD	No	August 21, 2007

Add a new payment card set

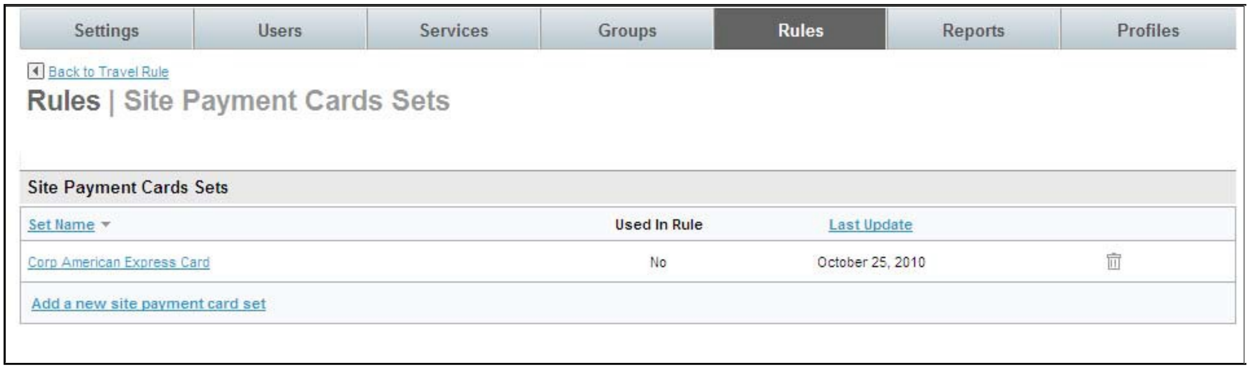
- Select the **Set Name** link to review the set or click **Add A New Payment Card Set** to add a new set.

x **Corporate Site Payment Cards**:

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Corporate Site Payment Card discussion.

- ○ **Site Payment Card Set:** Select the Site Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Site Payment Card Sets** link to go to the configuration page.

- The **Rules | Site Payment Cards Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

Rules | Site Payment Cards Sets

Site Payment Cards Sets

Set Name	Used In Rule	Last Update
Corp American Express Card	No	October 25, 2010

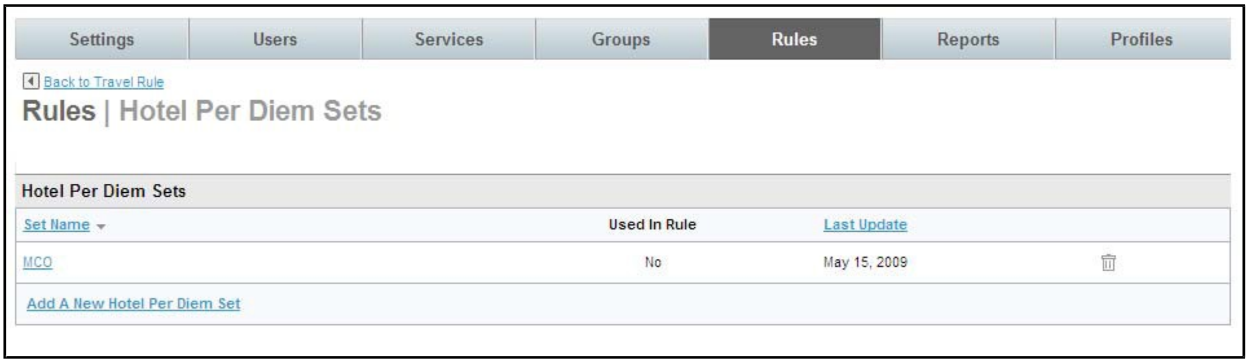
Add a new site payment card set

- Select the **Set Name** link to review the set or click **Add a New Site Payment Card Set** to add a new set.

x **Hotel Per Diems**:

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Hotel Per Diem discussion.

- **Hotel Per Diem Set:** Select the Hotel Per Diem Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Per Diems** link to go to the configuration page.
  - The **Rules | Hotel Per Diem Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

Rules | Hotel Per Diem Sets

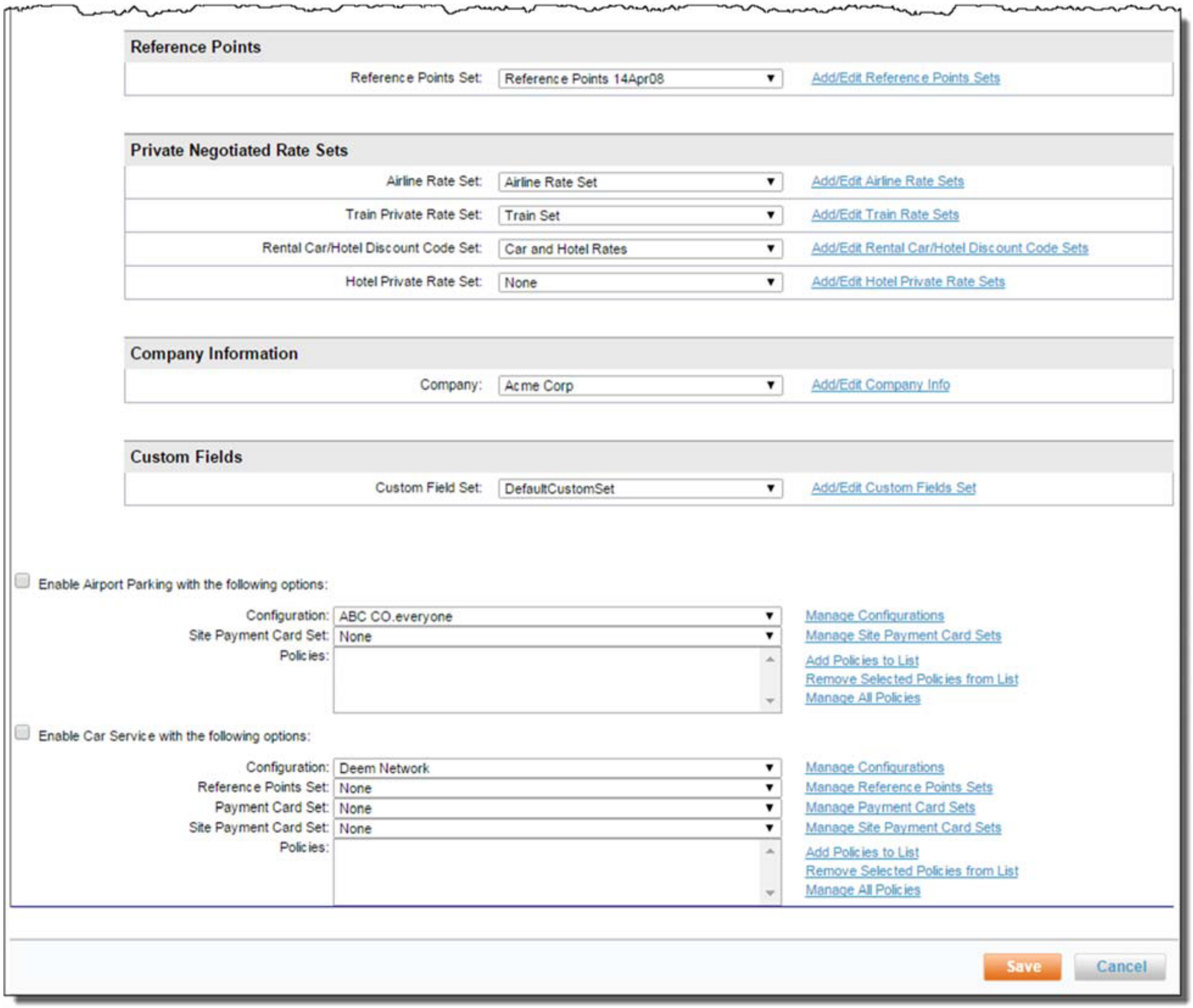
Hotel Per Diem Sets

Set Name	Used In Rule	Last Update
MCO	No	May 15, 2009

Add A New Hotel Per Diem Set

- Select the **Set Name** link to review the set or click **Add Hotel Per Diem Set** to add a new set.

7. Scroll down further in the **THEN** section of the page. (Reference Points through the bottom of the page is displayed)



Reference Points

Reference Points Set: Reference Points 14Apr08

Private Negotiated Rate Sets

Airline Rate Set: Airline Rate Set

Train Private Rate Set: Train Set

Rental Car/Hotel Discount Code Set: Car and Hotel Rates

Hotel Private Rate Set: None

Company Information

Company: Acme Corp

Custom Fields

Custom Field Set: DefaultCustomSet

☐ Enable Airport Parking with the following options:

Configuration: ABC CO.everyone

Site Payment Card Set: None

Policies:

☐ Enable Car Service with the following options:

Configuration: Deem Network

Reference Points Set: None

Payment Card Set: None

Site Payment Card Set: None

Policies:

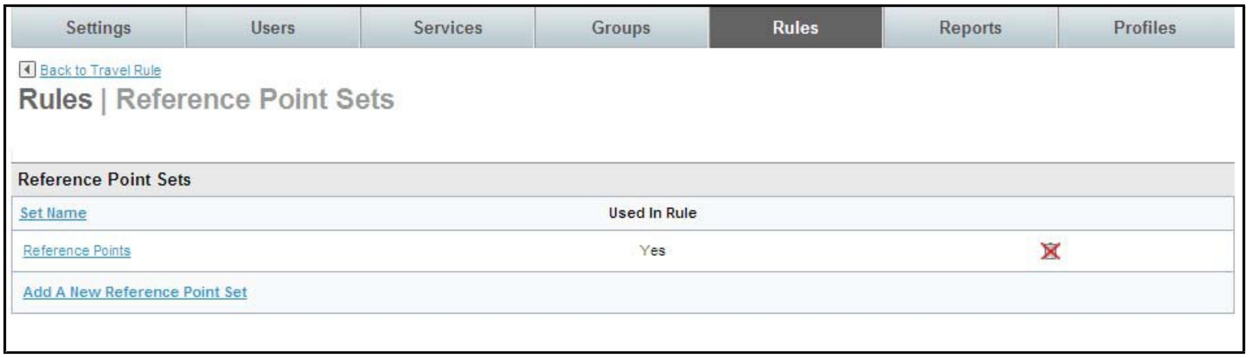
Add/Edit Reference Points Sets
Add/Edit Airline Rate Sets
Add/Edit Train Rate Sets
Add/Edit Rental Car/Hotel Discount Code Sets
Add/Edit Hotel Private Rate Sets
Add/Edit Company Info
Add/Edit Custom Fields Set
Manage Configurations
Manage Site Payment Card Sets
Add Policies to List
Remove Selected Policies from List
Manage All Policies
Manage Configurations
Manage Reference Points Sets
Manage Payment Card Sets
Manage Site Payment Card Sets
Add Policies to List
Remove Selected Policies from List
Manage All Policies
Save
Cancel

- **Reference Points**:

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Reference Point discussion.

  - **Reference Points Set:** Select the Reference Points Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Reference Points Sets** link to go to the configuration page.

- The **Rules | Reference Point Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

Rules | Reference Point Sets

Reference Point Sets

Set Name	Used In Rule	
Reference Points	Yes	☒
Add A New Reference Point Set		

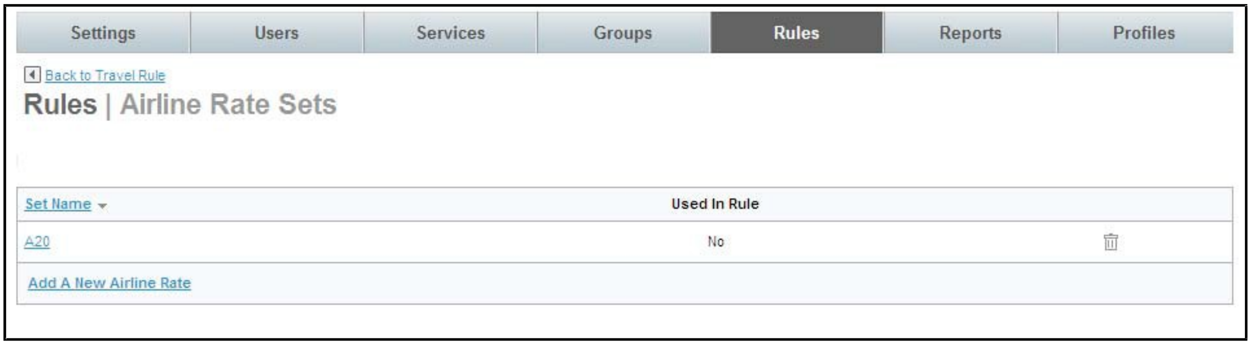
- Select the **Set Name** link to review the set or click **Add A New Reference Point Set** to add a new set.

x **Private Negotiated Rate Sets**:

Note: Please refer to *Module 3: Travel (Part Two)* for configuration of Private Rates discussion.

○ **Private Negotiated Rates Set:** Select the Airline Rate Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Airline Rate Sets** link to go to the configuration page.

- The **Rules | Airline Rate Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

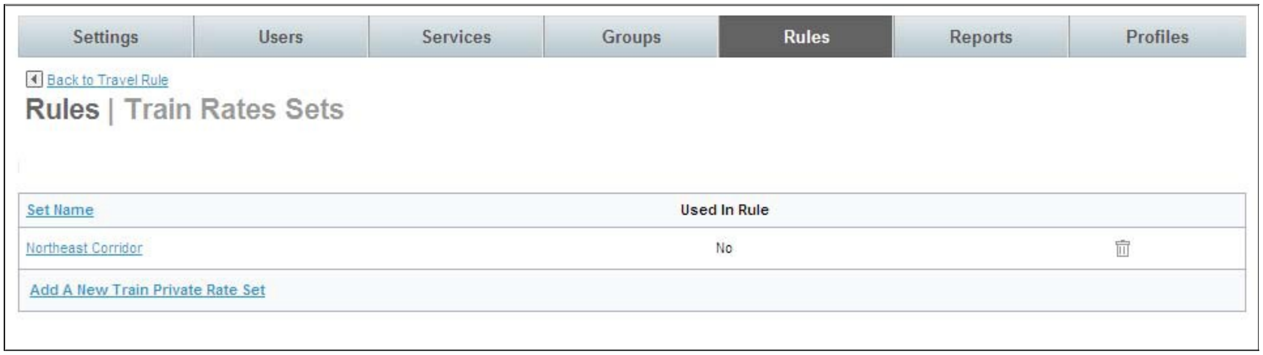
Rules | Airline Rate Sets

Set Name ▾	Used In Rule	
A20	No	🗑
Add A New Airline Rate		

- Select the **Set Name** link to review the set or click **Add A New Airline Rate** to add a new set.

○ **Train Private Rate Set:** Select the Train Private Rate Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Train Rate Sets** link to go to the configuration page.

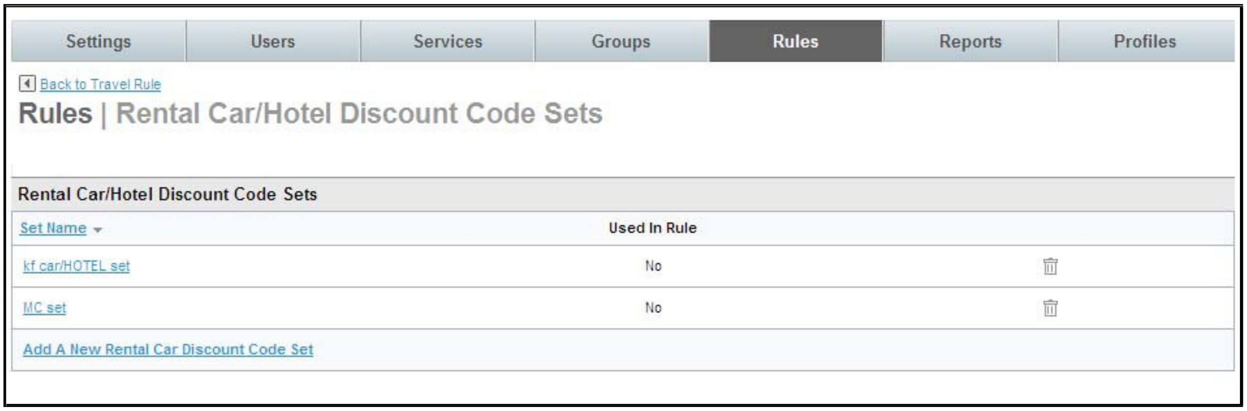
- The **Rules | Train Rates Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

Rules | Train Rates Sets

Set Name	Used In Rule	
Northeast Corridor	No	🗑
Add A New Train Private Rate Set		

    - Select the **Set Name** link to review the set or click **Add A New Train Private Rate Set** to add a new set.
  - **Rental Car / Hotel Discount Code Set:** Select the Rental Car / Hotel Discount Code Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Rental Car / Hotel Discount Code Sets** link to go to the configuration page.
    - The **Rules | Rental Car / Hotel Discount Sets** page is displayed.



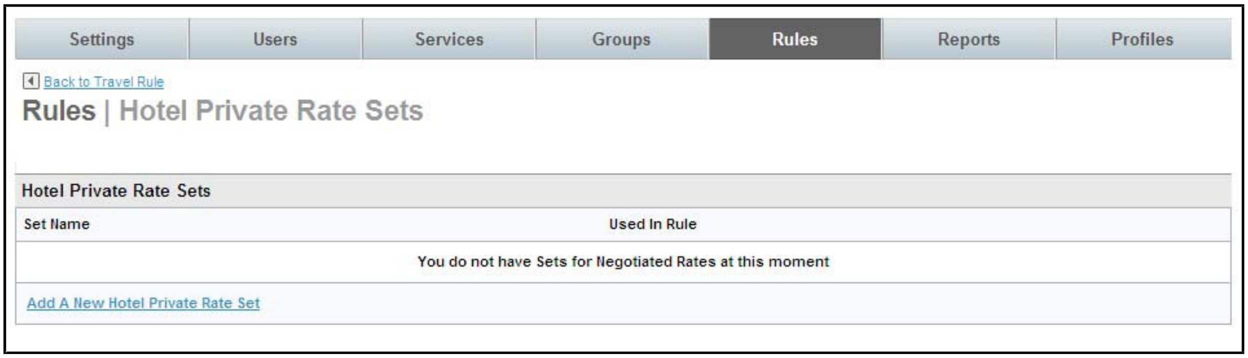
Rules | Rental Car/Hotel Discount Code Sets

Rental Car/Hotel Discount Code Sets

Set Name	Used In Rule
kf car/HOTEL set	No
MC set	No

Add A New Rental Car Discount Code Set

    - Select the **Rental Car / Hotel Discount Code Set Name** link to review the set or click **Add A New Rental Car Discount Code Set** to add a new set.
  - **Hotel Private Rate Set:** Select the Hotel Private Rate Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Hotel Private Rate Sets** link to go to the configuration page.
    - The **Rules | Hotel Private Rate Sets** page is displayed.



Rules | Hotel Private Rate Sets

Hotel Private Rate Sets

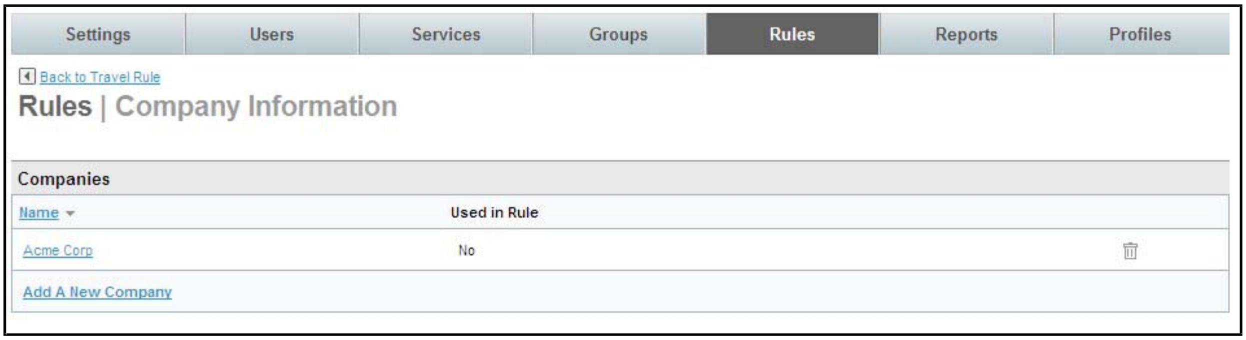
Set Name	Used In Rule
You do not have Sets for Negotiated Rates at this moment	

Add A New Hotel Private Rate Set

    - Select the **Hotel Private Rate Set Name** link to review the set or click **Add A New Hotel Private Rate Set** to add a new set.
- **Company Information**:

Note: Please refer to *Module 1: Roles and Responsibilities of Administrators* for configuration of Company Information discussion.

- **Company:** Select the Company previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Company Info** link to go to the configuration page.
  - The **Rules | Company Information** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

Rules | Company Information

Companies

Name	Used in Rule
Acme Corp	No

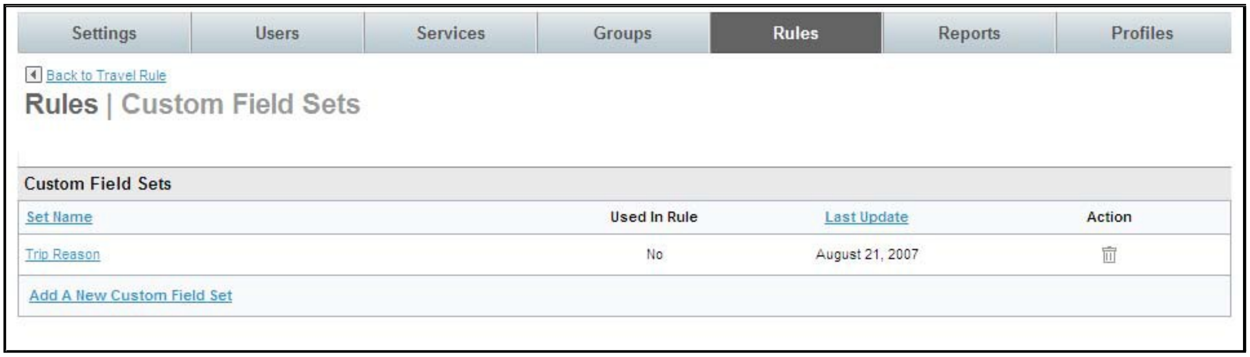
Add A New Company

  - Select the **Company Information** link to review the set or click **Add A New Company** to add a new set.

x **Custom Fields**:

Note: Please refer to *Module 2: Travel (Part One)* for configuration of Custom Fields discussion.

- **Custom Field Set:** Select the Custom Field Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Add / Edit Custom Fields Set** link to go to the configuration page.
  - The **Rules | Custom Field Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

Rules | Custom Field Sets

Custom Field Sets

Set Name	Used In Rule	Last Update	Action
Trip Reason	No	August 21, 2007	🗑

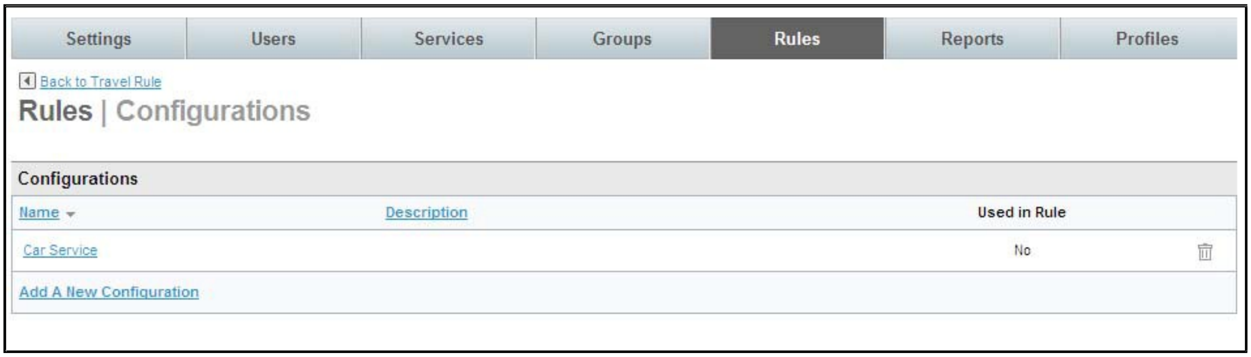
Add A New Custom Field Set

  - Select the **Custom Field Set Name** link to review the set or click **Add A New Custom Field Set** to add a new set.

x **Enable Car Service with the following options:**

Note: Please refer to *Module 6: Longtail Services* for configuration of Car Service discussion.

- ○ **Configuration:** Select the Configuration previously established from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Configurations** link to go to the configuration page.
  - The **Rules | Configurations** page is displayed.

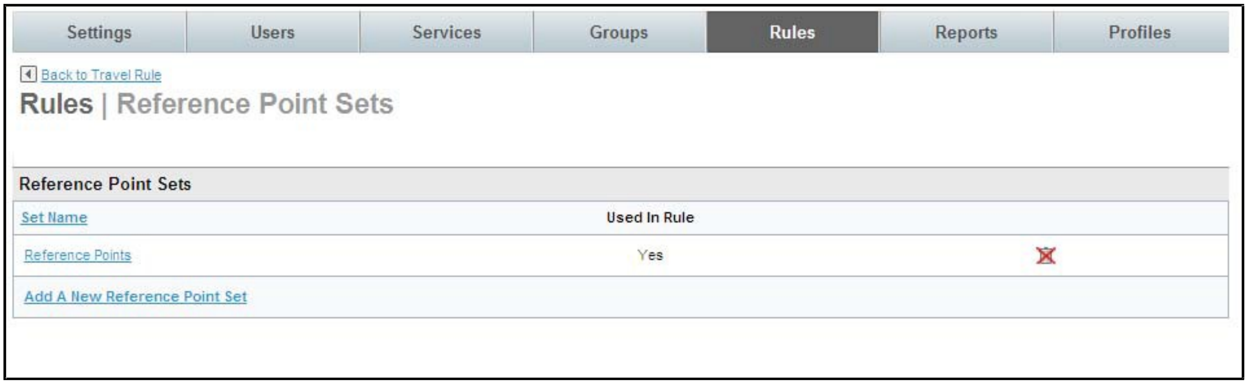

Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule
Add A New Configuration

Rules | Configurations

Configurations

Name	Description	Used in Rule	
Car Service		No	

  - Select the **Configuration Name** link to review the set or click **Add A New Configuration** to add a new set.
- ○ **Reference Points Set:** Select the Reference Points Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Reference Points Sets** link to go to the configuration page.
  - The **Rules | Reference Point Sets** page is displayed.

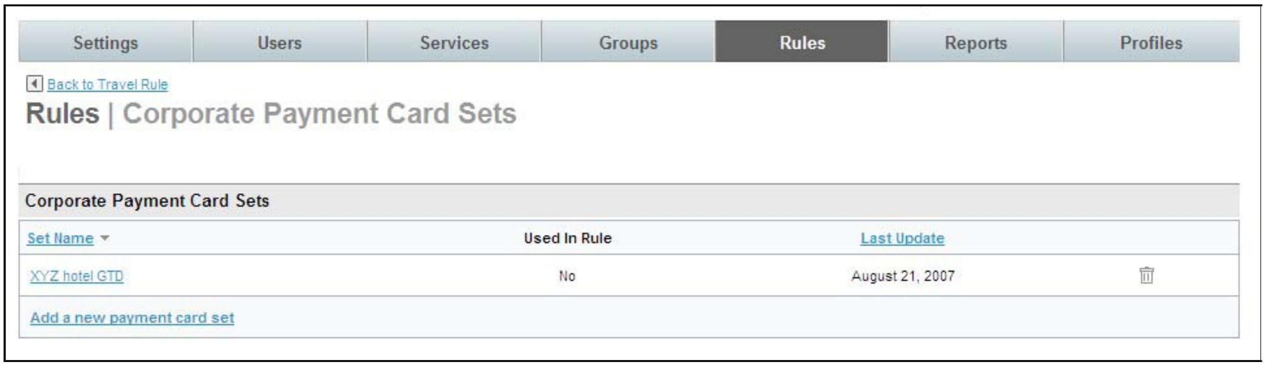

Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule
Add A New Reference Point Set

Rules | Reference Point Sets

Reference Point Sets

Set Name	Used In Rule	
Reference Points	Yes	☒

  - Select the **Reference Point Set Name** link to review the set or click **Add A New Reference Point Set** to add a new set.
- ○ **Payment Card Set:** Select the Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Payment Card Sets** link to go to the configuration page.
  - The **Rules | Corporate Payment Cards Sets** page is displayed.

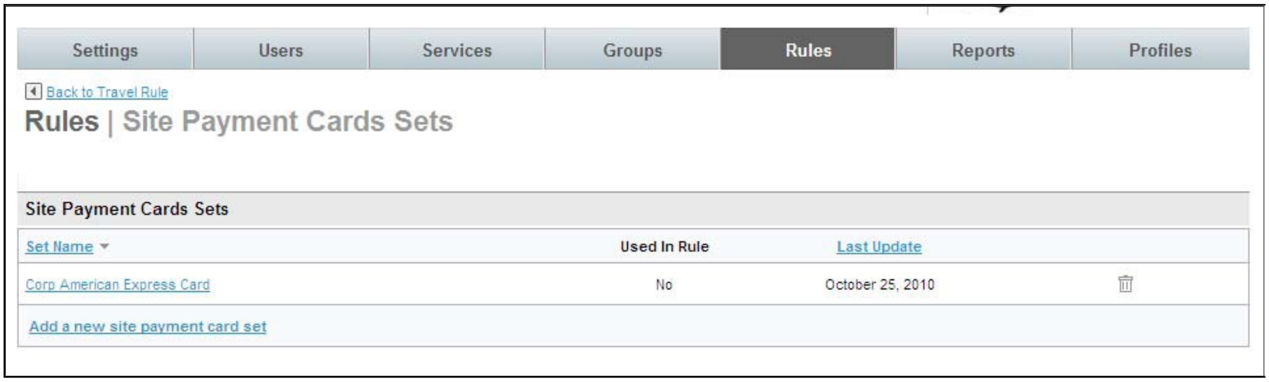

Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule
Add a new payment card set

Rules | Corporate Payment Card Sets

Corporate Payment Card Sets

Set Name	Used In Rule	Last Update	
XYZ hotel GTD	No	August 21, 2007	

  - Select the **Corporate Payment Cards Set Name** link to review the set or click **Add A New Payment Card Set** to add a new set.
- ○ **Site Payment Card Set:** Select the Site Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Site Payment Card Sets** link to go to the configuration page.
  - The **Rules | Site Charge Cards Sets** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

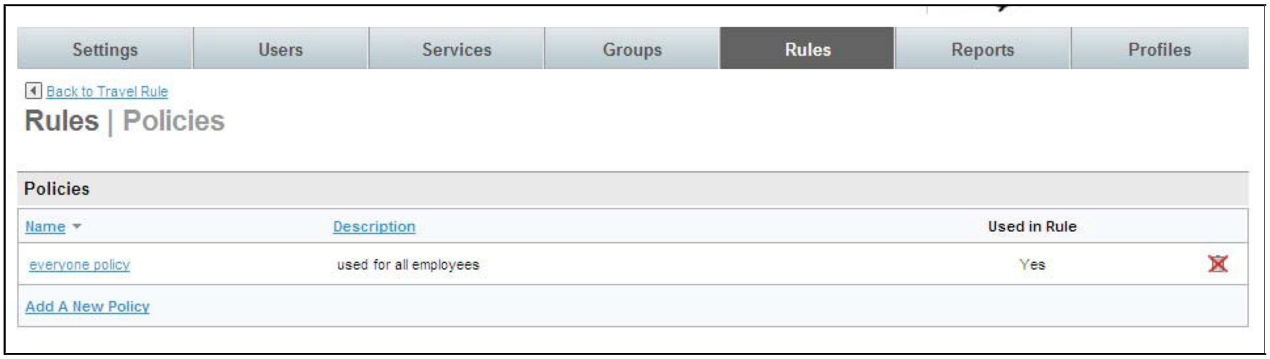
Rules | Site Payment Cards Sets

Site Payment Cards Sets

Set Name	Used In Rule	Last Update	
Corp American Express Card	No	October 25, 2010	

Add a new site payment card set

  - Select the **Site Payment Cards Sets | Set Name** link to review the set or click **Add A New Site Payment Card Set** to add a new set.
- ○ **Policies:** Select the Policy previously configured from the drop down list.
  - If a new configuration is needed click the **Manage All Policies** link and click the **Add A New Policy** link.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule

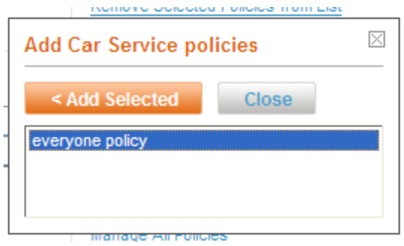
Rules | Policies

Policies

Name	Description	Used in Rule	
everyone policy	used for all employees	Yes	

Add A New Policy

  - To add an existing policy to the list, click the **Add Policies to List** link, select the policy and click the **Add Selected** button.


Add Car Service policies
< Add Selected
Close
everyone policy

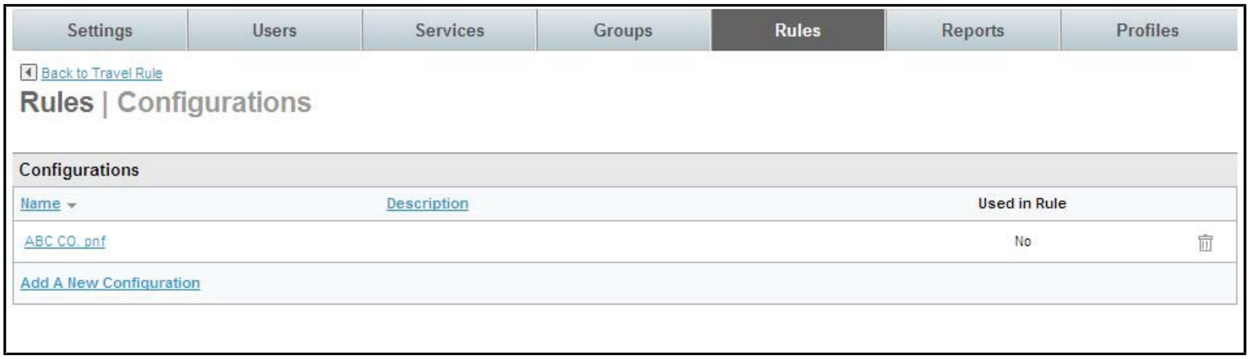
  - To Remove Policies from the list, click the policy to select it, and then click the **Remove Selected Policies from list** link to remove it from the list.
  - To review an existing set, click the **Manage All Policies** link to go to the configuration page.
  - To review an existing set, click the **Policies Name** link to go to the configuration page.

- If a new Policy is needed click the **Add A New Policy** link to go to the configuration page.

x **Enable Airport Parking service with the following options:**

Note: Please refer to *Module 6: Marketplace Services* for configuration of Airport Parking discussion.

- **Configuration:** Select the Configuration previously established from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Configurations** link to go to the configuration page.
  - The **Rules | Configurations** page is displayed.



Rules | Configurations

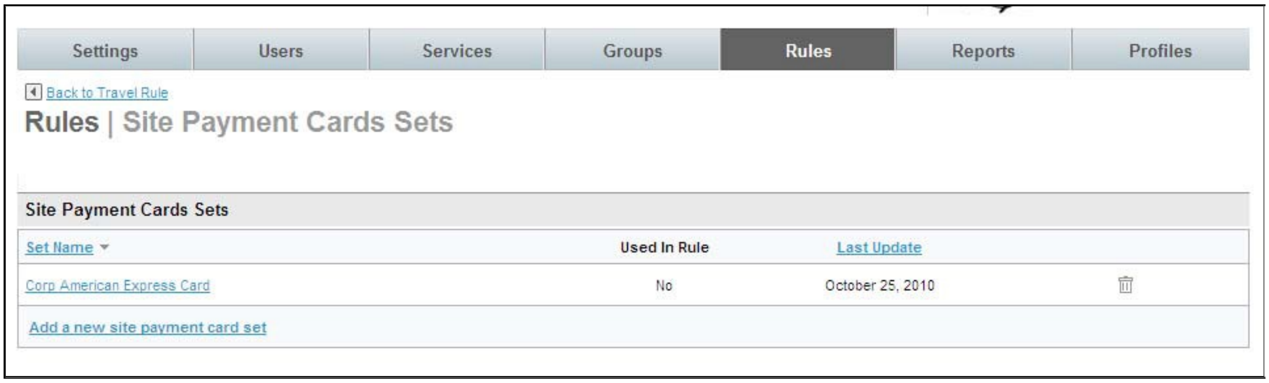
Configurations

Name	Description	Used in Rule
ABC CO. pnf		No

Add A New Configuration

- Select the **Configurations Name** link to review the set or click **New Configuration** to add a new configuration.

- **Site Payment Card Set:** Select the Site Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the **Manage Site Payment Card Sets** link to go to the configuration page.
  - The **Rules | Site Charge Cards Sets** page is displayed.



Rules | Site Payment Cards Sets

Site Payment Cards Sets

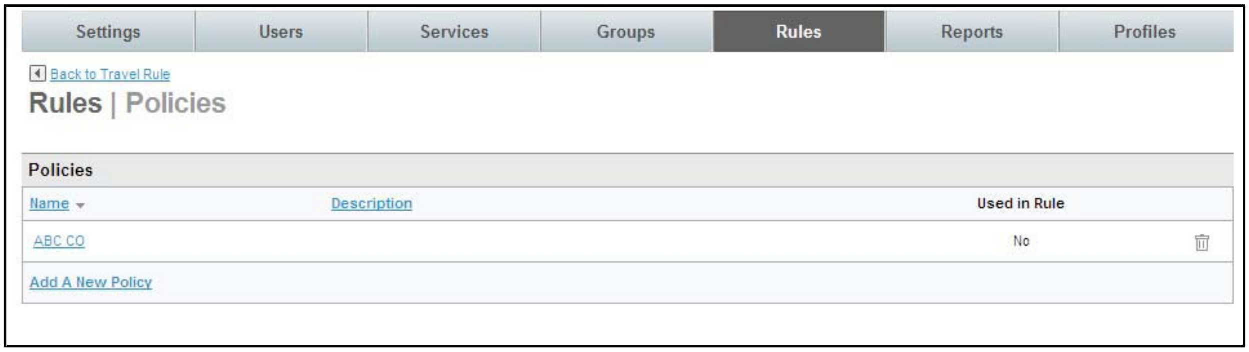
Set Name	Used In Rule	Last Update
Corp American Express Card	No	October 25, 2010

Add a new site payment card set

- Select the **Site Payment Cards Sets | Set Name** link to review the set or click **Add A New Site Payment Card Set** to add a new set.

- **Policies:** Select the Policy previously configured from the drop down list.
  - To link an existing configuration to the rule, click the **Add Policies to List** link to go to the list of previously configured policies and make selections. Click the **Add Selected** button to add that policy to the rule.
  - To Remove Policies from the list, click the policy to select it, and then click the **Remove Selected Policies from list** link to remove it from the list.

- To review an existing set or add a new one, click the **Manage All Policies** link to go to the configuration page.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Travel Rule
Rules | Policies
Add A New Policy

Policies

Name	Description	Used in Rule
ABC CO		No

8. Click **Save** to save changes to the Travel Rule configuration.
9. Click the **Changes not applied** link to commit changes. The Travel Service Rules have been established for the Everyone Group.

2.2 *Groups Tab*

Groups are used in the Deem application to define collections of users who have similar characteristics and can be gathered together for rule enforcement. By default, all users belong to the Everyone Group. Every new site has an Everyone Group.

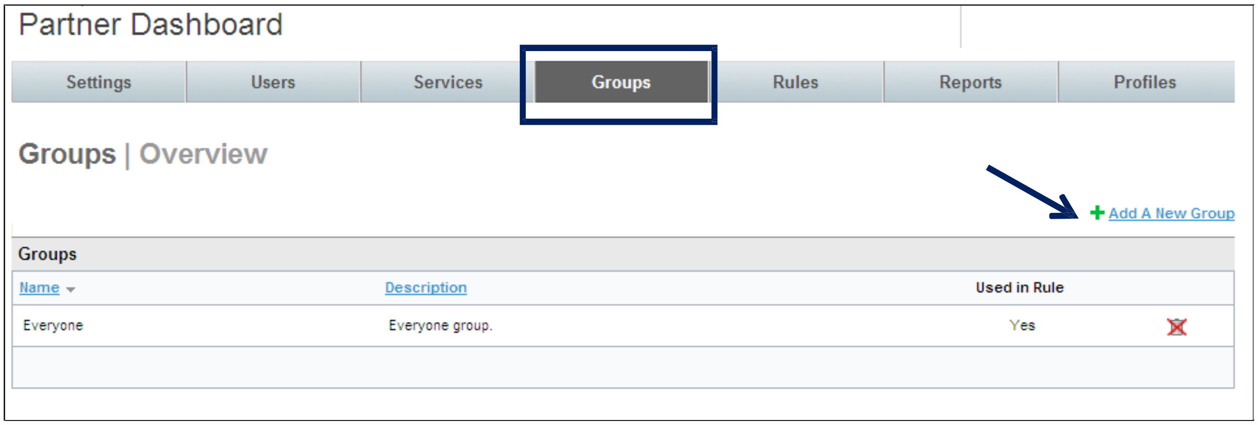
2.2.1 *Travel Service Rules for Other Groups of Users*

For the users we identified earlier (Michael and Jacque), we will need to set up 2 additional groups or collections of users for VIPs based on their country and VIP Indicator. We'll allow Agency and Display Configurations previously set up to be applied to the appropriate groups.

2.2.1.1 *Defining Groups*

First we will create a group to which we will add the VIP users.

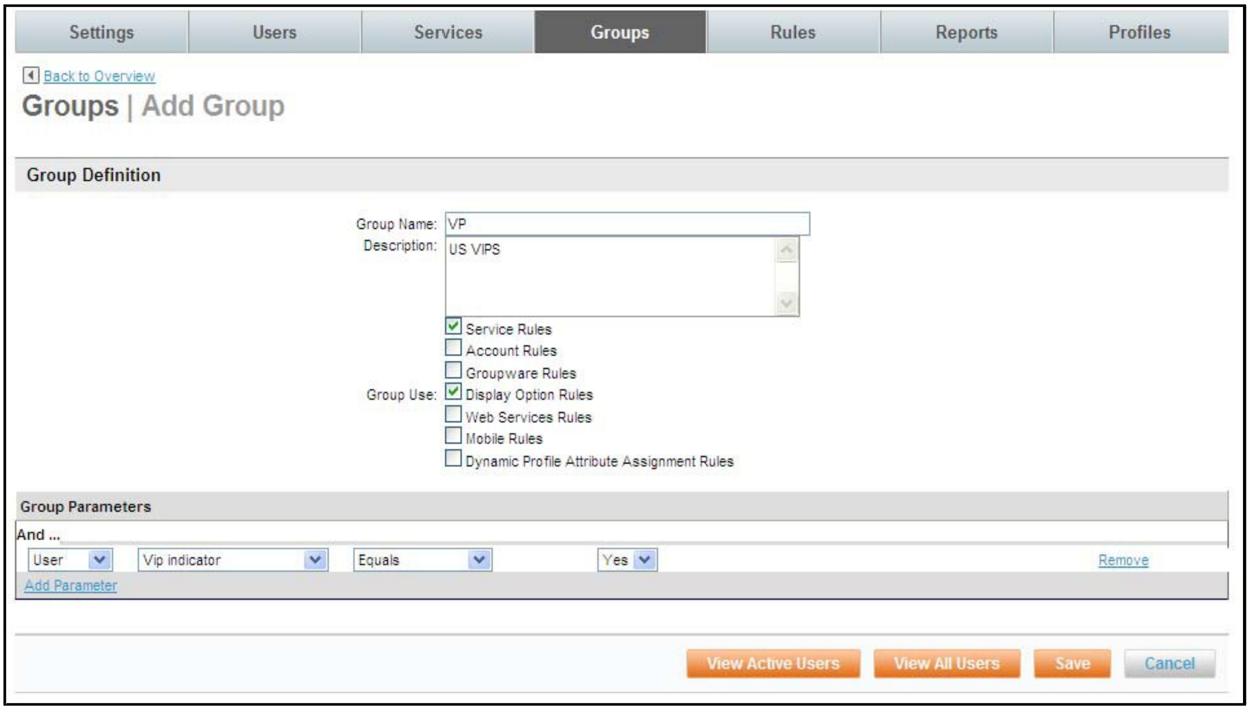
1. Click the **Groups** tab and then the **Add a New Group** link.


Partner Dashboard
Settings
Users
Services
Groups
Rules
Reports
Profiles
Groups | Overview
Add A New Group

Groups

Name	Description	Used in Rule
Everyone	Everyone group.	Yes

2. The **Groups** | **Add Group** page is displayed.



Group Name: VP
Description: US VIPS
Group Use:
☑ Service Rules
☐ Account Rules
☐ Groupware Rules
☑ Display Option Rules
☐ Web Services Rules
☐ Mobile Rules
☐ Dynamic Profile Attribute Assignment Rules

And ...
User | Vip indicator | Equals | Yes

3. Complete the page:

   - **Group Name:** Enter a name that will be easily recognizable for the group (VIP, for example)

Note: Do not include any special characters in the Group Name.

   - **Description:** Enter an optional group description.
   - **Group Use:** Select the Rules where this group will be used.
     - **Service Rules**: Select this checkbox if the group will be displayed in the list of groups for Service Rules. (We have checked this box for the US VIP Group)
     - **Account Rules**: Select this checkbox if the group will be displayed in the list of groups for Account Rules.
     - **Groupware Rules**: Select this checkbox if the group will be displayed in the list of groups for Groupware Rules.
     - **Display Options Rules**: Select this checkbox if the group will be displayed in the list of groups for Display Options Rules. (We have checked this box for the US VIP Group)
     - **Web Services Rules**: Select this checkbox if the group will be displayed in the list of groups for Web Services Rules.
     - **Mobile Rules**: Select this checkbox if the group will be displayed in the list of groups for Mobile Rules.
     - **Dynamic Profile Attribute Assignment Rules**: Select this checkbox if the group will be displayed in the list of groups for Dynamic Profile Attribute Assignment Rules.
   - **Group Parameters:** Select user criteria to define this group:
     - If **Group** was selected, select an existing Group name from the drop down list
     - If **User** was selected, a list of fields found on the user profile is displayed. Search criteria can include: External ID, User Name / Login, First Name, Middle Name, Last Name, Email, Work Phone, Home Phone, Employee ID, Mobile Phone, Employee

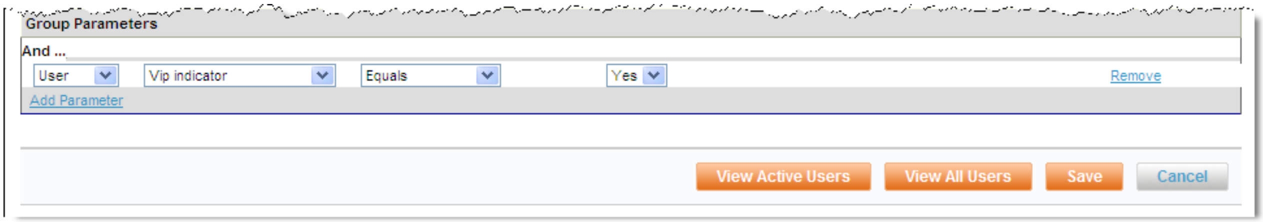
Status, Job Title, Job Level, Cost Center, Department Code, Department Name, Division, Business Unit, Company Name, Country Code, Groupware ID, Subdomain Short Name, Number of Credit Cards, Is Guest User, VIP Indicator, Employee Type, Is a Traveler, Dynamic Group Name and MIS 1 – 7.

Note: We have selected *VIP Indicator = Yes* to define the US VIP Group.

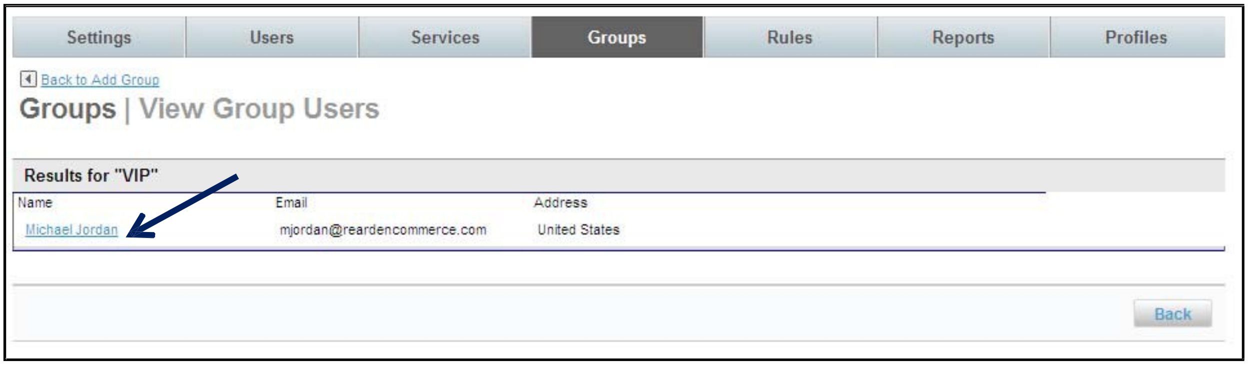
Note: Click the Add Parameter link if more than one Parameter is needed to define the group.

---

4. Click the **View Active Users** button to be sure the value used as the parameter is correct.


Group Parameters
And ...
User
Vip indicator
Equals
Yes
Remove
Add Parameter
View Active Users
View All Users
Save
Cancel

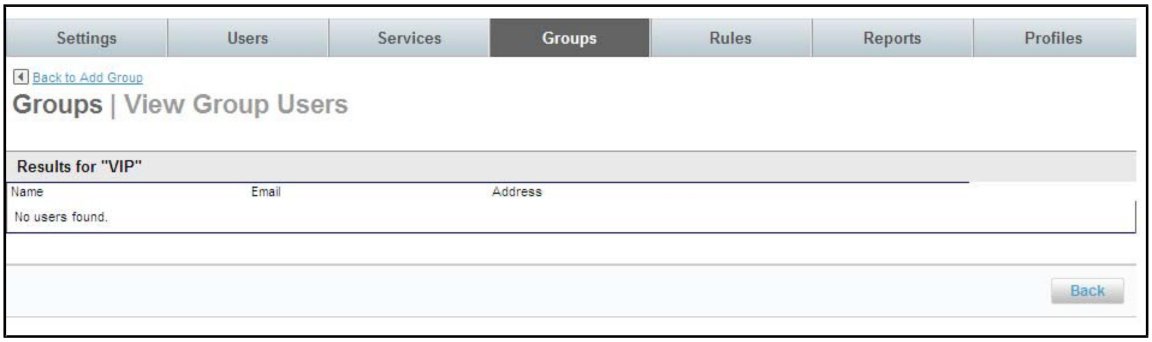
5. A list of users who fit the criteria is displayed. Assure the list includes appropriate users. Click **Back** to return to the **Groups** | **Add Group** page.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Add Group
Groups | View Group Users
Back

Results for "VIP"

Name	Email	Address
Michael Jordan	mjordan@reardencommerce.com	United States

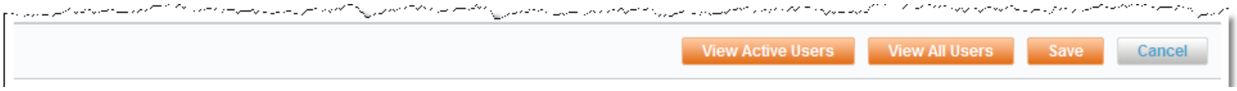
Note: If no users fit the criteria, the below page is displayed. Click Back to return to the Groups | Add Group page and adjust the selection criteria.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Add Group
Groups | View Group Users
Back

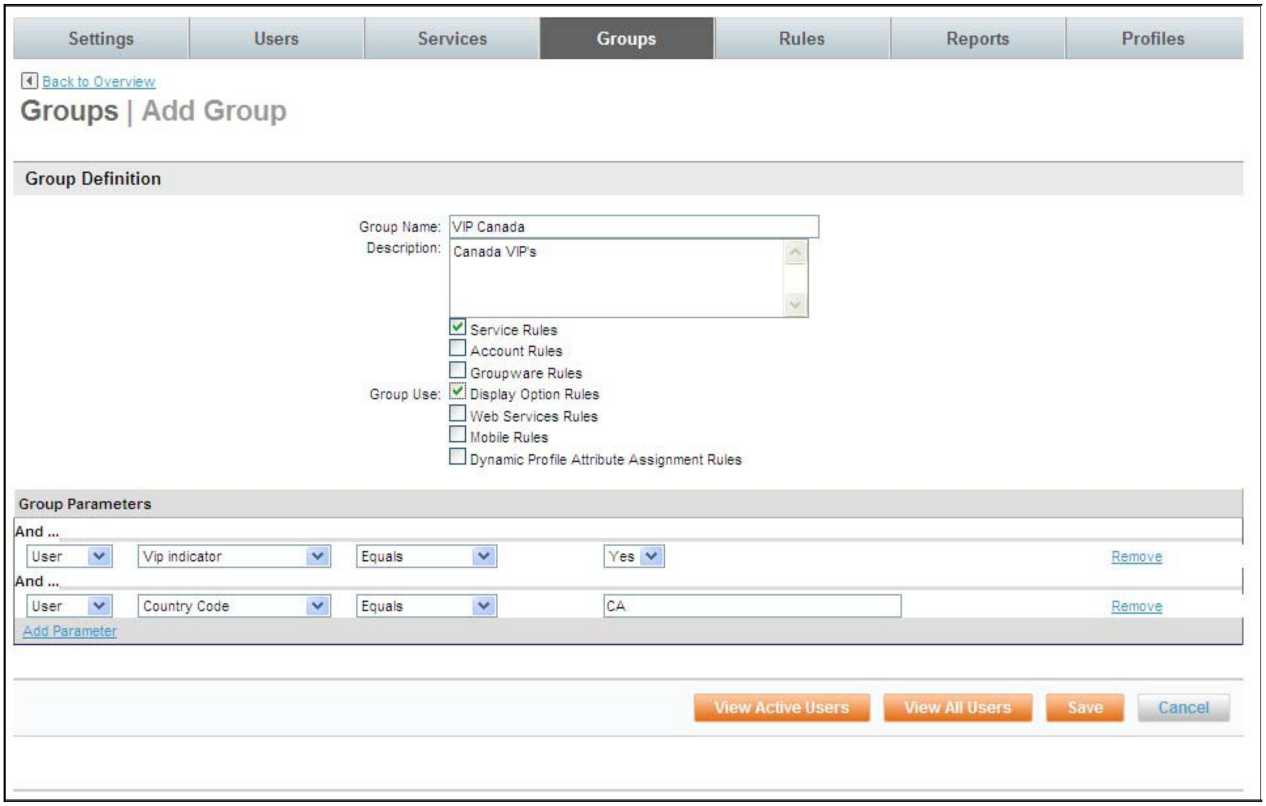
Results for "VIP"

Name	Email	Address
No users found.		

6. Click **Save** to save the group.


View Active Users
View All Users
Save
Cancel

7. Repeat this process for each group of users needed. For our example, we will also need to create a group for Canadian VIP Users.
8. Click the **Add Group** link again. The **Groups** | **Add Group** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Overview
Groups | Add Group
Group Definition
Group Parameters
Add Parameter
Remove
View Active Users
View All Users
Save
Cancel

Group Name: VIP Canada
Description: Canada VIP's
Group Use:
☑ Service Rules
☐ Account Rules
☐ Groupware Rules
☑ Display Option Rules
☐ Web Services Rules
☐ Mobile Rules
☐ Dynamic Profile Attribute Assignment Rules

And ... User | Vip indicator | Equals | Yes
And ... User | Country Code | Equals | CA

9. Be sure to use both the VIP Indicator and the Country Code as group Parameters when creating the Canadian VIP group to differentiate it from the US VIP group. Click **Save**.
10. The **Groups** | **Overview** page is re-displayed with the new group.
11. Click the **Changes not applied** link to commit changes. **Commit** the changes.

Important Note: By using the "Is a Traveler" designation, the number of profiles that are sent to the GDS can be limited to just the users who are travelers. We recommend a group be added that represents the travelers. Select the group parameter of "Is a Traveler" to define this group. Only those users who have Travel Preferences will be included in this group.

2.3 Applying Rules for Other Groups of Users

Now that we have configured rules for the **Everyone Group**, and added 2 groups let's set up travel rules for these other groups of users.

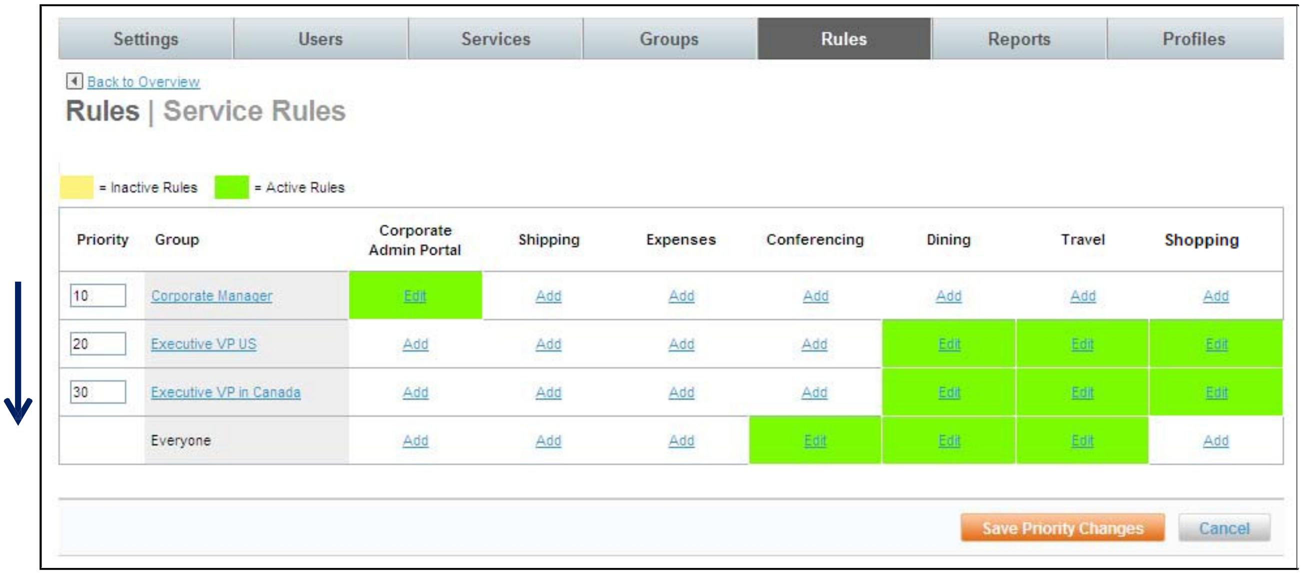
For our example, Michael and Jacque have been set up in separate groups. We will need to do 2 things:

i. Set the correct Priority for the groups
ii. Configure rules for the VIP Groups based on their country code and VIP Indicator

2.3.1 *Working with Rule Priorities*

When rules are enforced, the Group selection parameters are engaged to determine the group into which the user falls. The rule for the group closest to the top is processed first. A user can belong to more than one group, but the group highest on the list to which they belong will be the rule that is enforced.

Take a look at how the groups are currently prioritized.



Rules | Service Rules

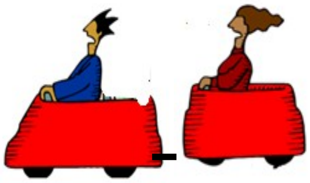
🟨 = Inactive Rules 🟩 = Active Rules

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Shopping
10	Corporate Manager	Edit	Add	Add	Add	Add	Add	Add
20	Executive VP US	Add	Add	Add	Add	Edit	Edit	Edit
30	Executive VP in Canada	Add	Add	Add	Add	Edit	Edit	Edit
	Everyone	Add	Add	Add	Edit	Edit	Edit	Add

The users will be funneled first through the Travel column top to bottom where there are rules enabled.

Michael –

VIP Group –

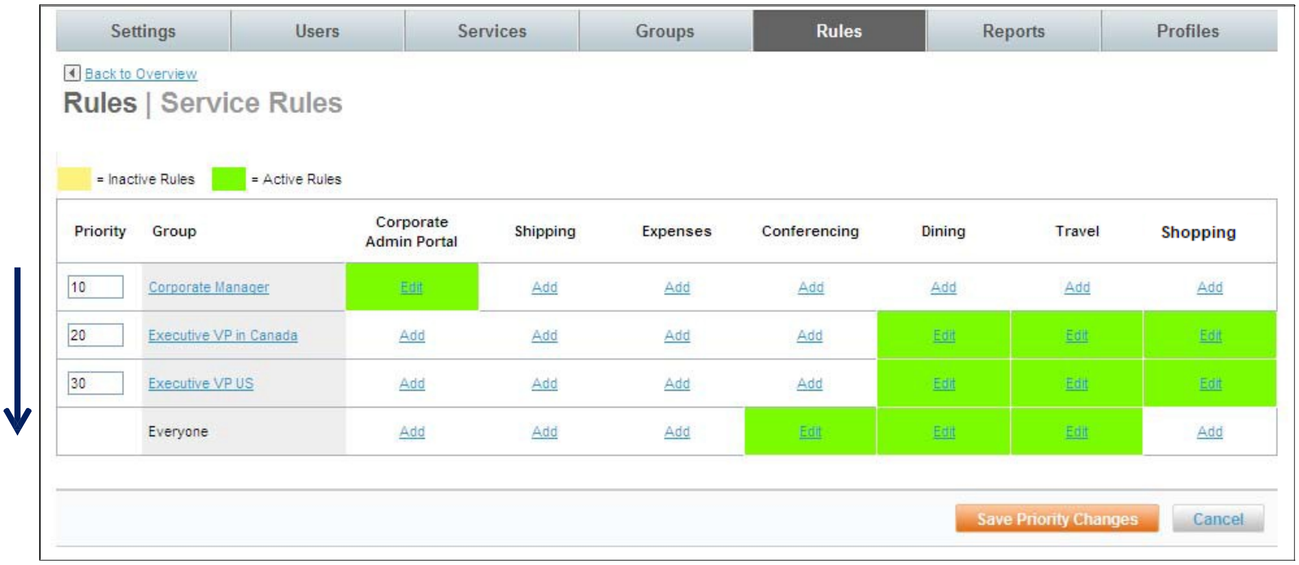


Jacque –

VIP Canada Group – VIP Indicator = Yes plus

The VIP US Group is higher than VIP Canada Group therefore the VIP US Group's selection parameters will be taken into consideration first to select users who meet the Group criteria. In our example, both Michael and Jacque have the VIP Indicator set to "Yes" as the selection parameter, therefore both Michael and Jacque will be selected. When the top most group finishes selecting users, the second group will select users that meet its selection parameters. Since Jacque has already been selected, he will be bypassed.

By reprioritizing the groups, Michael will be selected for the VIP US Group and Jacque will be selected for the VIP Canada Group.



Rules | Service Rules

🟨 = Inactive Rules 🟩 = Active Rules

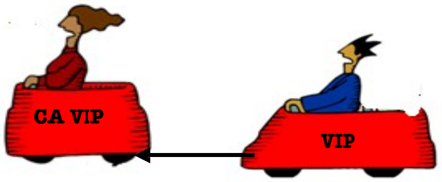
Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Shopping
10	Corporate Manager	🟩 Edit	Add	Add	Add	Add	Add	Add
20	Executive VP in Canada	Add	Add	Add	Add	🟩 Edit	🟩 Edit	🟩 Edit
30	Executive VP US	Add	Add	Add	Add	🟩 Edit	🟩 Edit	🟩 Edit
	Everyone	Add	Add	Add	🟩 Edit	🟩 Edit	🟩 Edit	Add

The users will be funneled through the VIP Canada Group selection parameters first.

Jacque –

VIP Canada Group – VIP

Indicator = Yes plus



Michael –

VIP Group –

Now, Jacque will follow the CA VIP Group rule and Michael will follow the VIP Group rule.

3 Marketplace Services

When Deem speaks about Marketplace Services, we are referring to services other than Air, Car Rental and Hotel. Marketplace Services are services which can also be enabled on the dashboard for additional savings and added control of spend. These services include:

- Airport Parking
- Car Service

Note: When a site is cloned from a template, all Marketplace Services are cloned too. Most of the services can remain the same as those found on the template, but some may need to be adjusted depending on the individual site’s requirements.

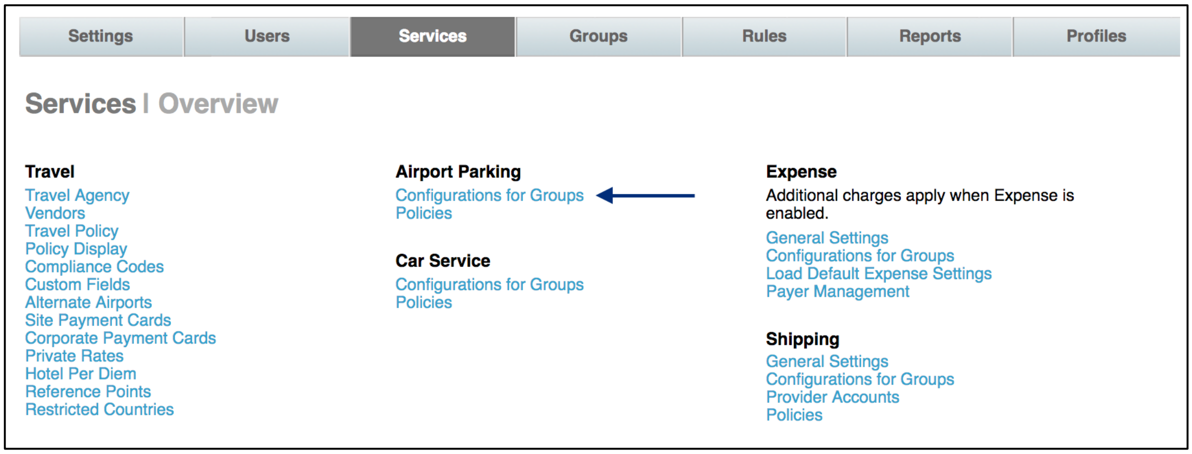
3.1 Airport Parking

The Deem Airport Parking service allows corporations to communicate airport parking policies to travelers and increases control over parking spend. The service allows the traveler to reserve airport parking at the corporate rate while following length of stay and other policies.

Deem has partnered with Park N’Fly in the US and Purple Parking in the UK to provide this service.

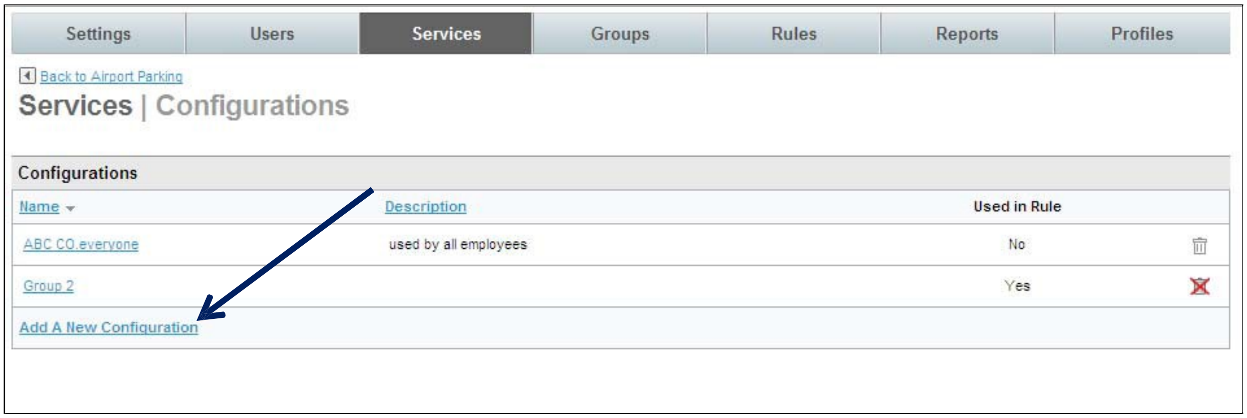
3.1.1 Airport Parking Configuration

1. Click the **Services Tab** then under the Airport Parking section, click the **Configurations for Groups Policies** 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

2. The **Services** | **Airport Parking** page is displayed. Click the **Configurations** link to configure how the service works for different groups.

3. The **Services** | **Configurations** page is displayed. Click **Add A New Configuration** link to add a new record, or click the name link of an existing configuration record to edit that record.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Airport Parking

Services | Configurations

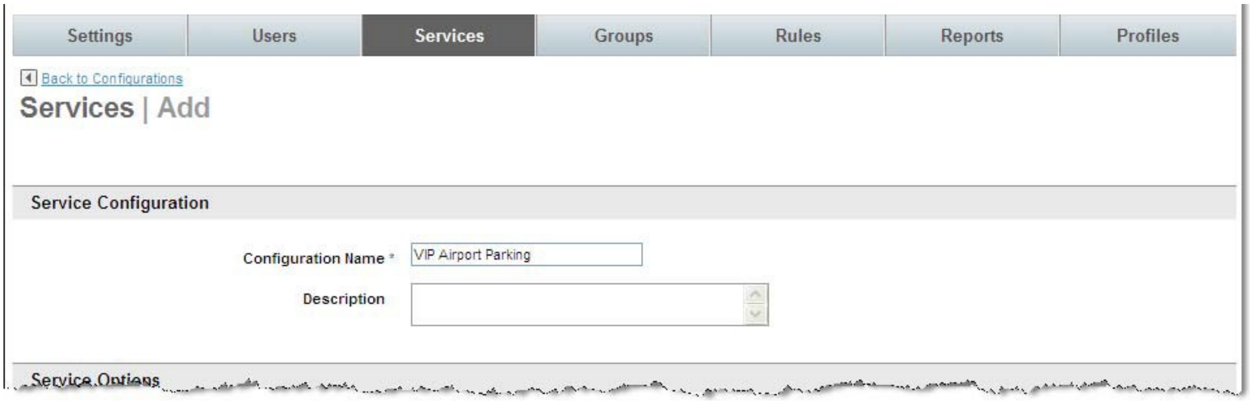
Configurations

Name	Description	Used in Rule
ABC CO.everyone	used by all employees	No
Group 2		Yes

Add A New Configuration

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

x **Service Configuration:**


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Configurations

Services | Add

Service Configuration

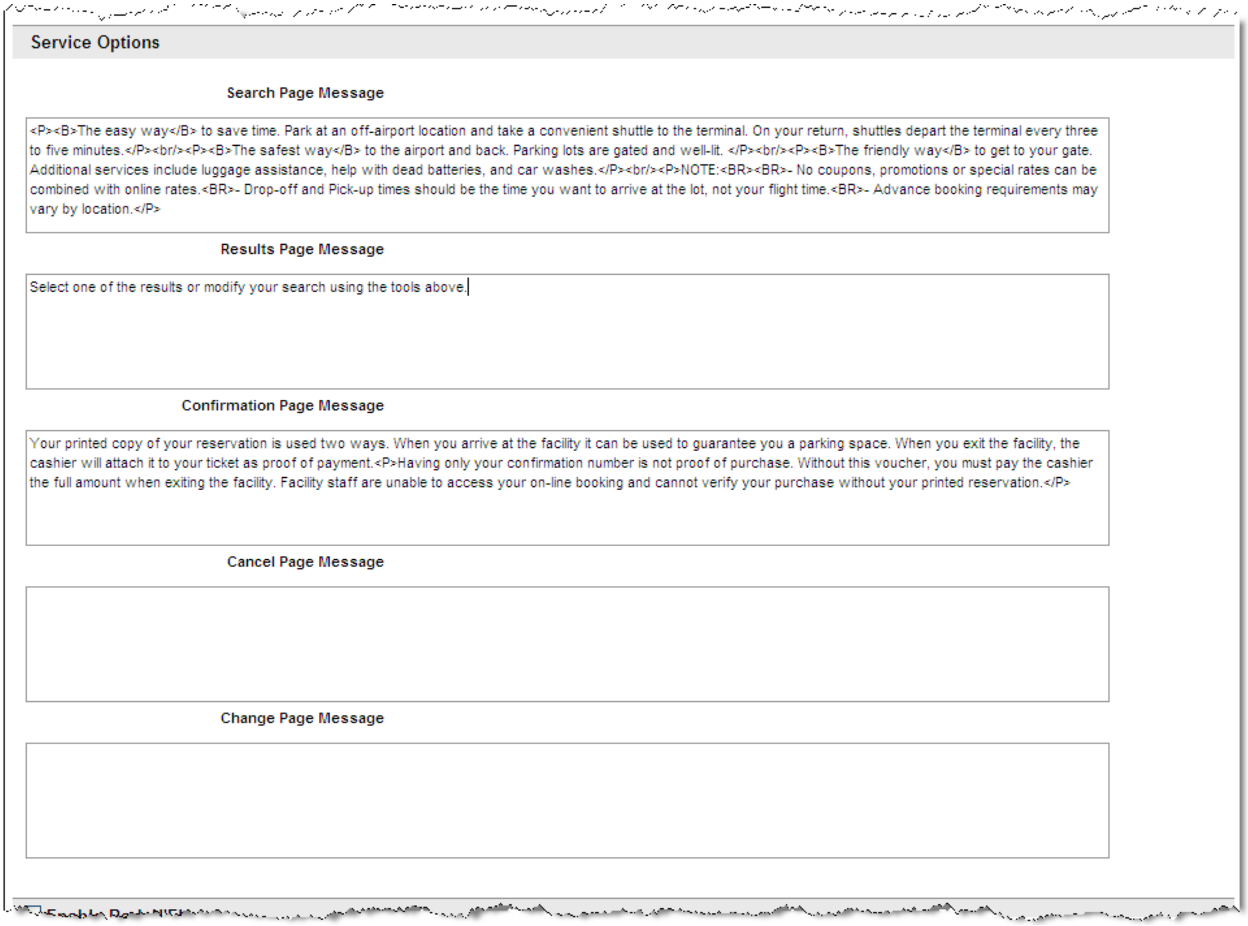
Configuration Name * VIP Airport Parking

Description

Service Options

- **Configuration Name:** Name the configuration. This name should be easily recognizable as a specific airport parking configuration. An example is *VIP Airport Parking* to show that this configuration is for VIP travelers.
- **Description:** Provide an optional description for the configuration.

- **Service Options:**



Search Page Message

<P><B>The easy way</B> to save time. Park at an off-airport location and take a convenient shuttle to the terminal. On your return, shuttles depart the terminal every three to five minutes.</P><br/><P><B>The safest way</B> to the airport and back. Parking lots are gated and well-lit. </P><br/><P><B>The friendly way</B> to get to your gate. Additional services include luggage assistance, help with dead batteries, and car washes.</P><br/><P>NOTE:<BR><BR>- No coupons, promotions or special rates can be combined with online rates.<BR>- Drop-off and Pick-up times should be the time you want to arrive at the lot, not your flight time.<BR>- Advance booking requirements may vary by location.</P>

Results Page Message

Select one of the results or modify your search using the tools above.

Confirmation Page Message

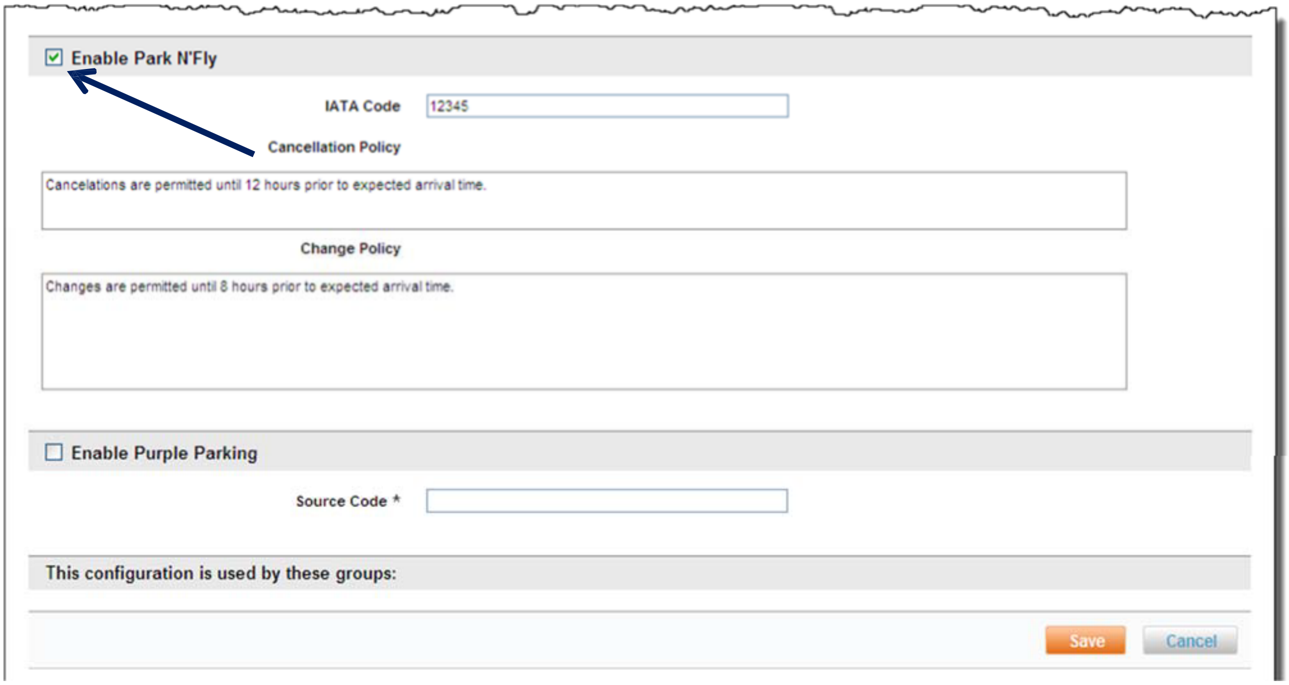
Your printed copy of your reservation is used two ways. When you arrive at the facility it can be used to guarantee you a parking space. When you exit the facility, the cashier will attach it to your ticket as proof of payment.<P>Having only your confirmation number is not proof of purchase. Without this voucher, you must pay the cashier the full amount when exiting the facility. Facility staff are unable to access your on-line booking and cannot verify your purchase without your printed reservation.</P>

Cancel Page Message

Change Page Message

- **Search Page Message:** Enter the message using HTML tags or plain text to be displayed on the Airport Parking Search Page.
- **Results Page Message:** Enter the message using HTML tags or plain text to be displayed on the Airport Parking Search Results Page.
- **Confirmation Page Message:** Enter the message using HTML tags or plain text to be displayed on the Airport Parking Confirmation Page.
- **Cancel Page Message:** Enter the message using HTML tags or plain text to be displayed on the Airport Parking Cancellation Page.
- **Change Page Message:** Enter the message using HTML tags or plain text to be displayed on the Airport Parking Change Page.

x **Enable Park N'Fly:** Select the checkbox to enable the airport parking service using Park N'Fly and its affiliates. *Park N'Fly is available in the US only.*



☑ Enable Park N'Fly

IATA Code: 12345

Cancellation Policy: Cancelations are permitted until 12 hours prior to expected arrival time.

Change Policy: Changes are permitted until 8 hours prior to expected arrival time.

☐ Enable Purple Parking

Source Code *:

This configuration is used by these groups:

- **IATA Code:** Enter the agency's IATA code. One code will be issued per TMC or direct customer and can be the same number for use on all cloned sites.
- **Cancellation Policy:** Enter the message using plain text to be displayed under the rules and restrictions section of the purchase page as well as on the confirmation email sent to the traveler as the service cancellation policy.
- **Change Policy:** Enter the message using plain text to be displayed under the rules and restrictions section of the purchase page as well as on the confirmation email sent to the traveler as the service change policy.

x **Enable Purple Parking:** Select the checkbox to enable the airport parking service using Purple Parking and its affiliates. *Purple Parking is available in the UK only.*

- **Source Code:** Enter the corporate discount code provided to Deem by Purple Parking.

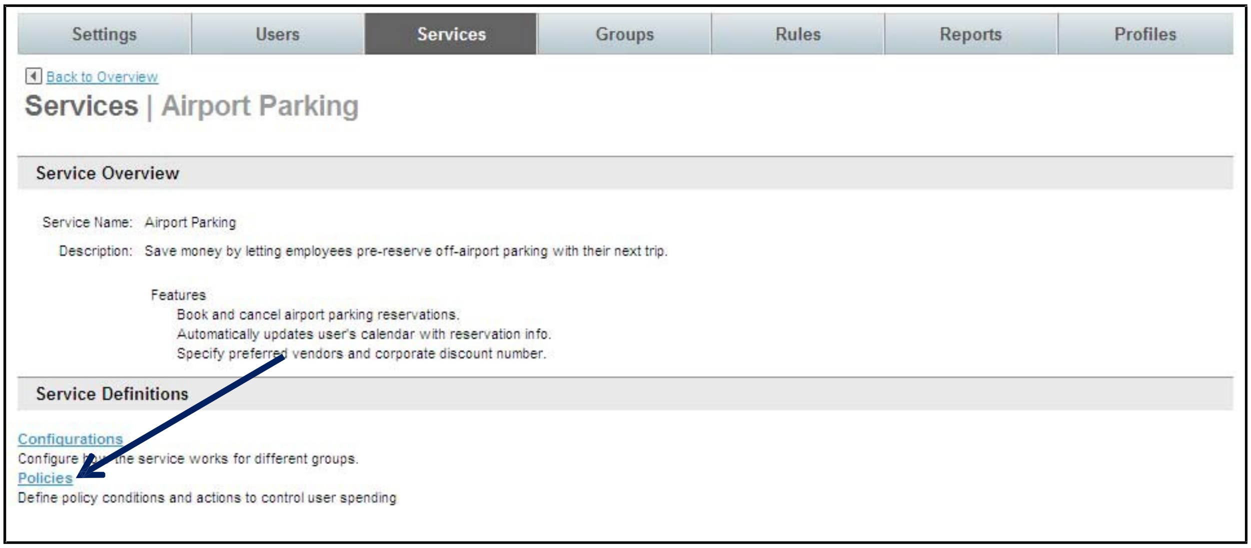
5. Click **Save** to save the configuration. Click the **Back to Airport Parking** link to return to the **Services | Airport Parking** page.

3.1.2 Airport Parking Policy

Upon configuration of the service, all selections made from the search results page would be considered within policy. To control company spend or airport parking selection, policies would need to be configured that specify what would be defined as *Out of Policy – Allowed* or *Out of Policy – Not Allowed.*

1. Click the **Services Tab** then the **Airport Parking** link in the **Travel** section of the page.

2. The **Services** | **Airport Parking** page is displayed. Click the **Policies** link to configure policy.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Overview

Services | Airport Parking

Service Overview

Service Name: Airport Parking

Description: Save money by letting employees pre-reserve off-airport parking with their next trip.

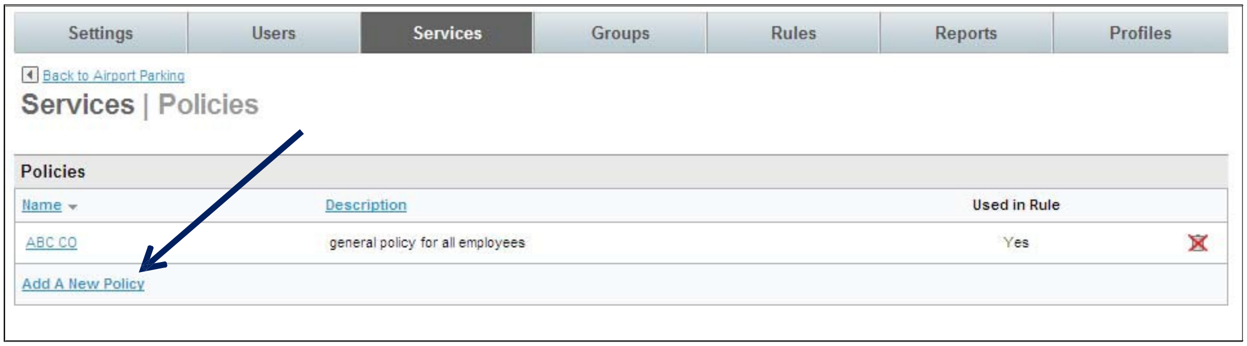
Features
Book and cancel airport parking reservations.
Automatically updates user's calendar with reservation info.
Specify preferred vendors and corporate discount number.

Service Definitions

Configurations
Configure how the service works for different groups.

Policies
Define policy conditions and actions to control user spending

3. The **Services** | **Policies** page is displayed. Click the **Add A New Policy** link to configure policy.

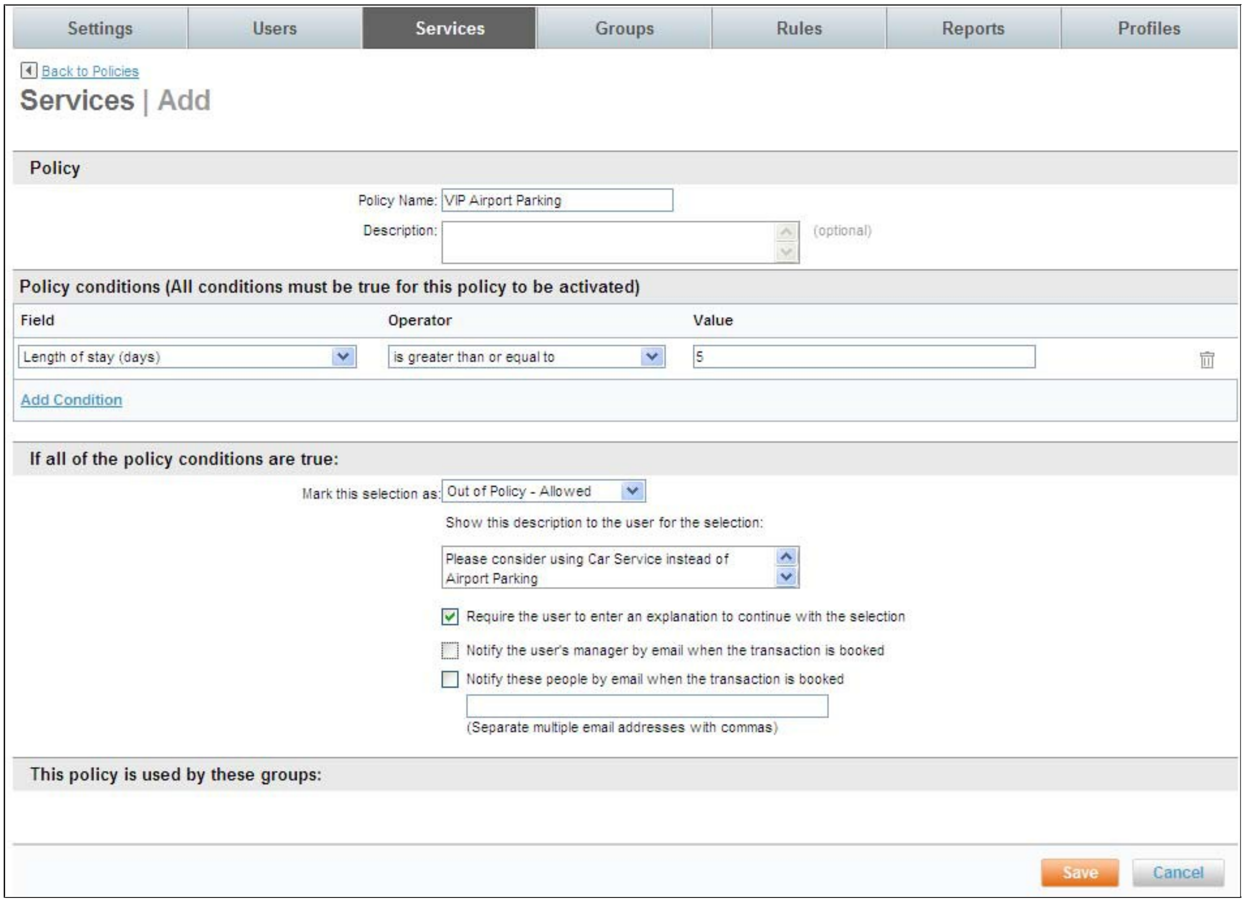

Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Airport Parking

Services | Policies

Policies

Name	Description	Used in Rule	
ABC CO	general policy for all employees	Yes	☒
Add A New Policy			

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



Policy

Policy Name: VIP Airport Parking

Description: (optional)

Policy conditions (All conditions must be true for this policy to be activated)

Field	Operator	Value
Length of stay (days)	is greater than or equal to	5

If all of the policy conditions are true:

Mark this selection as: Out of Policy - Allowed

Show this description to the user for the selection:

Please consider using Car Service instead of Airport Parking

☑ Require the user to enter an explanation to continue with the selection

☐ Notify the user's manager by email when the transaction is booked

☐ Notify these people by email when the transaction is booked

(Separate multiple email addresses with commas)

This policy is used by these groups:

- **Policy:**
  - **Policy Name:** Name the policy to be easily recognizable as a specific car service policy. An example is *VIP Airport Parking* to show that this configuration is for VIP travelers.
  - **Description:** Enter an optional policy description.
- **Policy conditions (All conditions must be true for this policy to be activated):**
  - **Field:** Select the field to use to define this policy

Field	Operator	
Supplier name Provider name Facility code Parking type Transaction currency code Airport code	Is equal to Is not equal to Contains Does not contain	Is in list Is not in list Starts with Ends with
Drop-off Pick-up Date	Is equal to Is not equal to After Before	Is in list Is not in list

Base cost, Daily rate	Is equal to	Is less than
Length of stay (days)	Is not equal to	Is less than or equal to
Total transaction amount	Is greater than	Is in list
Difference from lowest cost item	Is greater than or equal to	Is not in list

  - **Value:** Enter the value to use to determine if the field / operator is out of policy. Examples: When Daily rate is greater than 15, or when Length of stay (days) is greater than or equal to 5.
- **If all of the policy conditions are true:**
  - **Mark this selection as:**
    - **Out of Policy – Allowed:** This selection would result in the booking being allowed.
    - **Out of Policy – Not allowed:** This selection would result in a hard stop requiring the traveler to make a different selection.
  - **Show this description to the user for the selection:** Enter the message using HTML tags or plain text to be displayed to the traveler when the selection meets the criteria configured above as either Out of Policy – Allowed, or Out of Policy – Not Allowed.
  - **Require the user to enter an explanation to continue with the selection:** By selecting this checkbox, the traveler would see an additional text box asking them to supply an explanation as to why they believe their selection should be allowed.
  - **Notify the user's manager by email when the transaction is booked:** By selecting this checkbox, the traveler's manager, as noted on the traveler's profile, would receive an email when the "Out of policy – Allowed" booking was completed.
  - **Notify these people by email when the transaction is booked:** By selecting this checkbox, emails would be sent to the addresses entered in the box provided when a transaction is booked that is "Out of policy – Allowed". Separate multiple email address with commas.

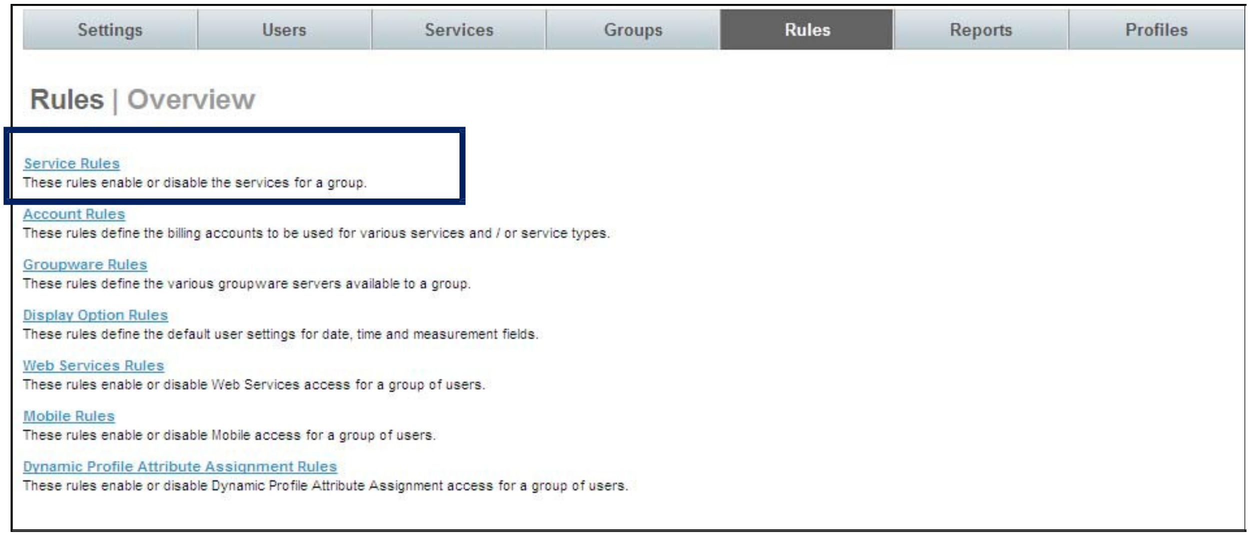
5. Click **Save** to save the policy. Click **Back to Airport Parking** to return to the Airport Parking Service Overview page.

3.1.3 Airport Parking Rules

Once the service and policy are configured and policy, if appropriate, add the service to a group of travelers.

To add the service to **Rules:**

1. Click **Rules** tab. The **Rules | Overview** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles

Rules | Overview

Service Rules
These rules enable or disable the services for a group.

Account Rules
These rules define the billing accounts to be used for various services and / or service types.

Groupware Rules
These rules define the various groupware servers available to a group.

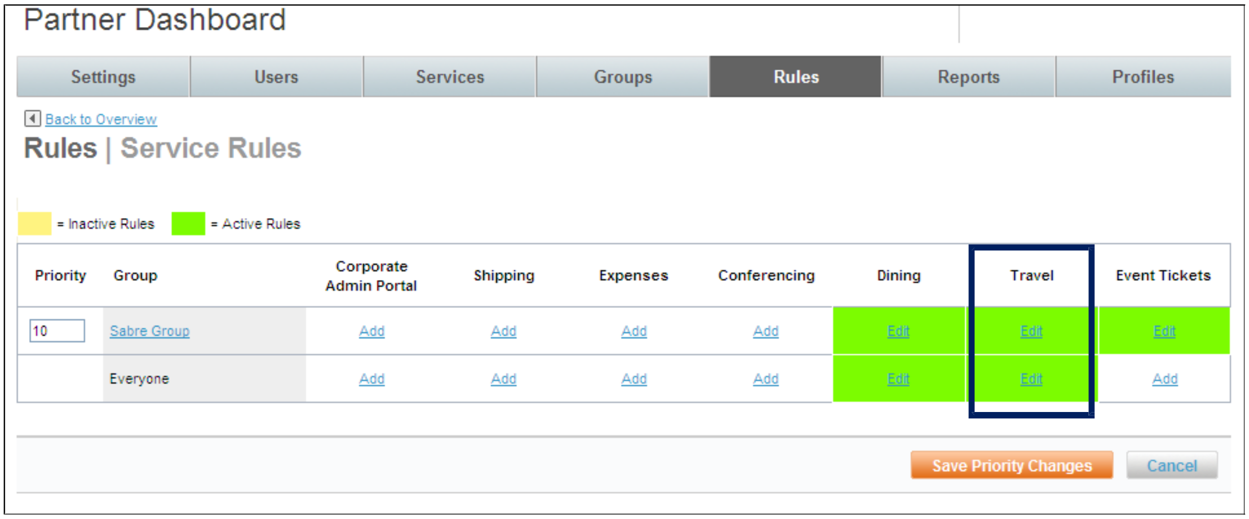
Display Option Rules
These rules define the default user settings for date, time and measurement fields.

Web Services Rules
These rules enable or disable Web Services access for a group of users.

Mobile Rules
These rules enable or disable Mobile access for a group of users.

Dynamic Profile Attribute Assignment Rules
These rules enable or disable Dynamic Profile Attribute Assignment access for a group of users.

2. Click the **Service Rules** link. The **Rules | Service Rules** page is displayed. Locate the group for which to allow **Airport Parking** and click on the **Add** or **Edit** link found in the **Travel** column.

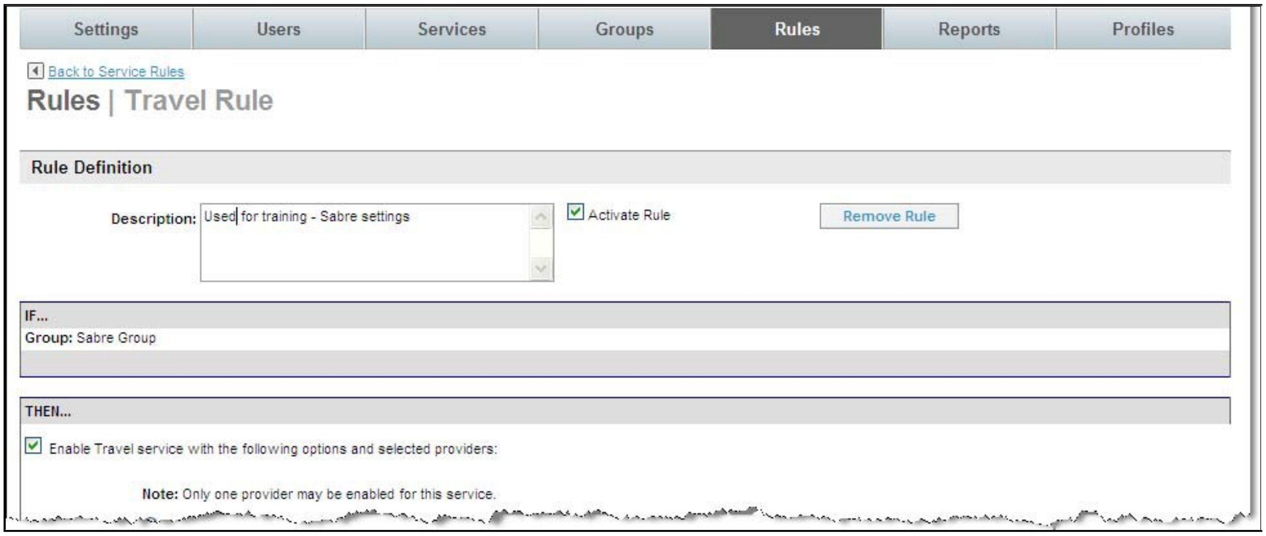

Partner Dashboard
Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Overview
Save Priority Changes
Cancel

Rules | Service Rules

🟨 = Inactive Rules 🟩 = Active Rules

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Event Tickets
10	Sabre Group	Add	Add	Add	Add	🟩 Edit	🟩 Edit	🟩 Edit
	Everyone	Add	Add	Add	Add	🟩 Edit	🟩 Edit	Add

3. The **Rules | Travel Rule** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Service Rules
Remove Rule

Rules | Travel Rule

Rule Definition

Description: Used for training - Sabre settings

☑ Activate Rule

IF...

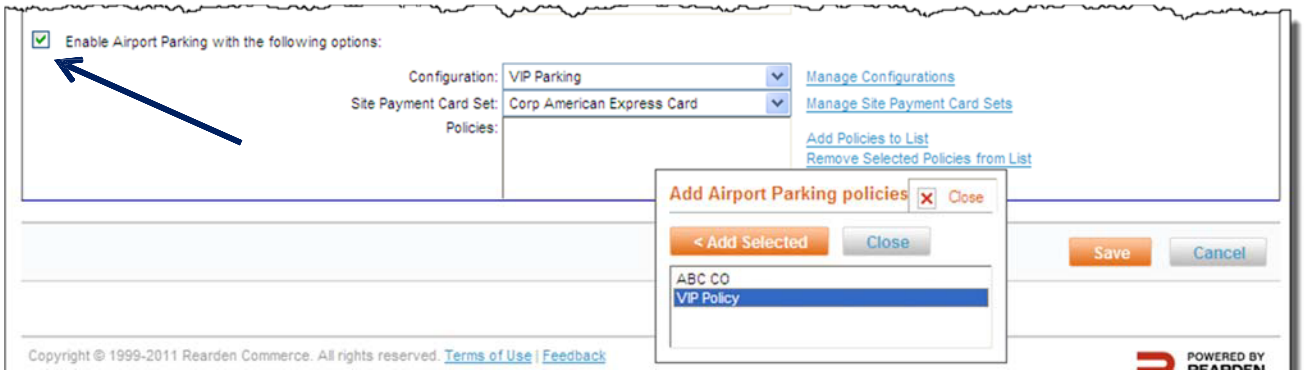
Group: Sabre Group

THEN...

☑ Enable Travel service with the following options and selected providers:

Note: Only one provider may be enabled for this service.

4. Scroll down to the bottom of the page to the **Enable Airport Parking** service with the following options section:


Manage Configurations
Manage Site Payment Card Sets
Add Policies to List
Remove Selected Policies from List
Add Airport Parking policies
Close
< Add Selected
Close
Save
Cancel
Terms of Use | Feedback
POWERED BY

☑ Enable Airport Parking with the following options:

Configuration: VIP Parking

Site Payment Card Set: Corp American Express Card

Policies:

ABC CO

VIP Policy

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5. Select the **Enable Airport Parking with the following options:** checkbox to enable this service for the group.
6. Click the **Configuration** drop down list and select the appropriate configuration for this group.
7. Click the **Site Payment Card Set** link to select a payment card set.
8. Click the **Add Policy to List** link to select the appropriate policy for this group.
9. Click the policy name and then the **Add Selected** button to select the policy and the **Close** button to close the selection box.
10. Click **Save** to save the Service Rule.
11. Click the **Changes not applied** link to commit the changes. The group of travelers will now see the Airport Parking option and receive out of policy notification if appropriate.

3.2 Car Service

Car Service allows travelers to book chauffeured car service through the Deem site. Deem has access to over 2000 car service providers.

There are two options when configuring car service; the **Deem Preferred Network** where Deem has established negotiated rates with approximately 25 vendors and **Custom Rates** where an agency can specify their own preferred providers and rates.

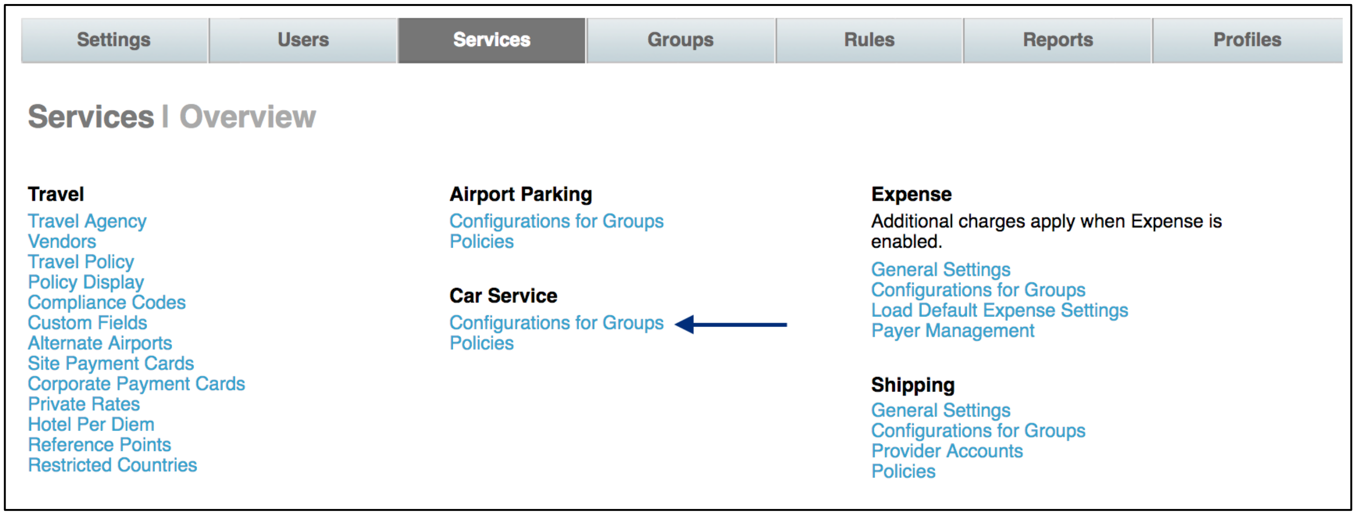
A configuration can include both US and UK (GroundRez) settings.

Note: There is a Deem Car Service Form required to enable Car Service. Enter a Support case to request the latest form.

3.2.1 Deem Preferred Network Configuration

To configure a Deem Preferred Network:

1. Click the **Services Tab** then under the Car Service section, click the **Configurations for Groups Policies** link.



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

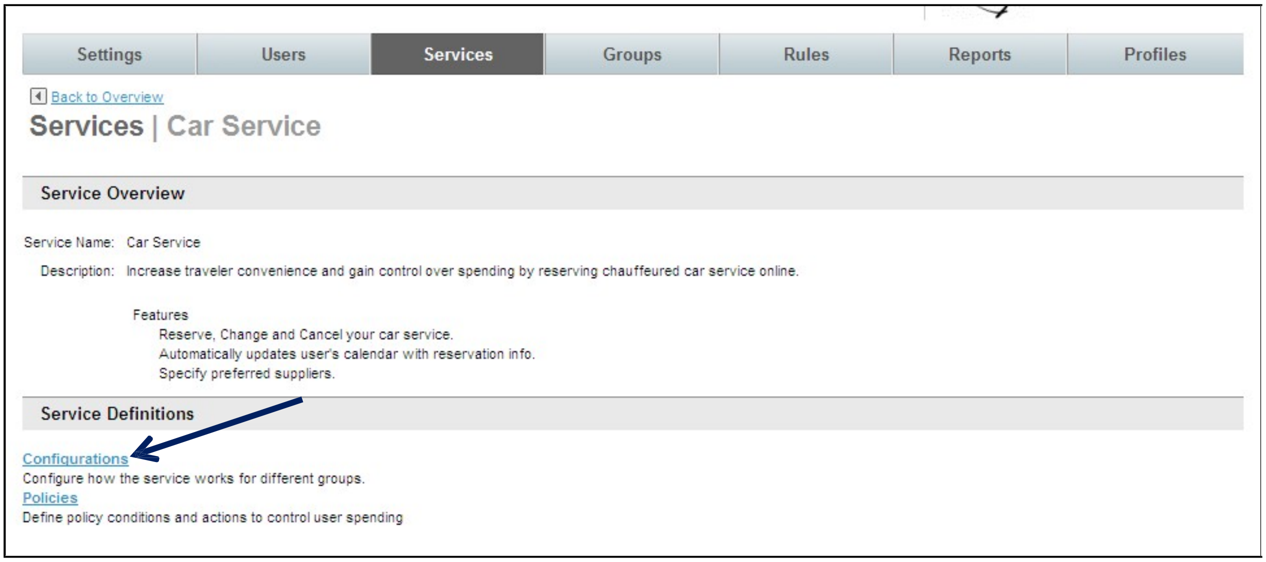
Airport Parking
Configurations for Groups
Policies

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

2. The **Services** | **Car Service** page is displayed. Click the **Configurations** link to configure the service.



Services | Car Service

Service Overview

Service Name: Car Service

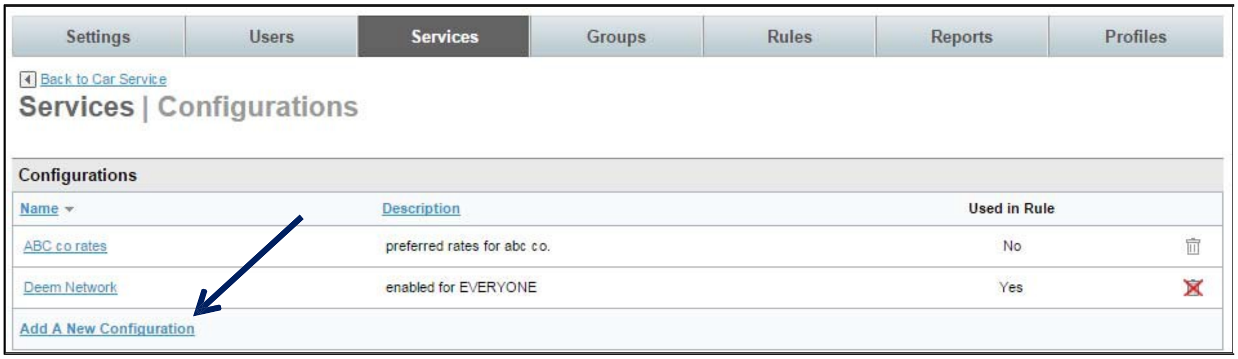
Description: Increase traveler convenience and gain control over spending by reserving chauffeured car service online.

Features
Reserve, Change and Cancel your car service.
Automatically updates user's calendar with reservation info.
Specify preferred suppliers.

Service Definitions

Configurations
Configure how the service works for different groups.
Policies
Define policy conditions and actions to control user spending

3. Click the **Add a New Configuration** link to add a new record, or click the name link of an existing configuration record to edit that record.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Car Service

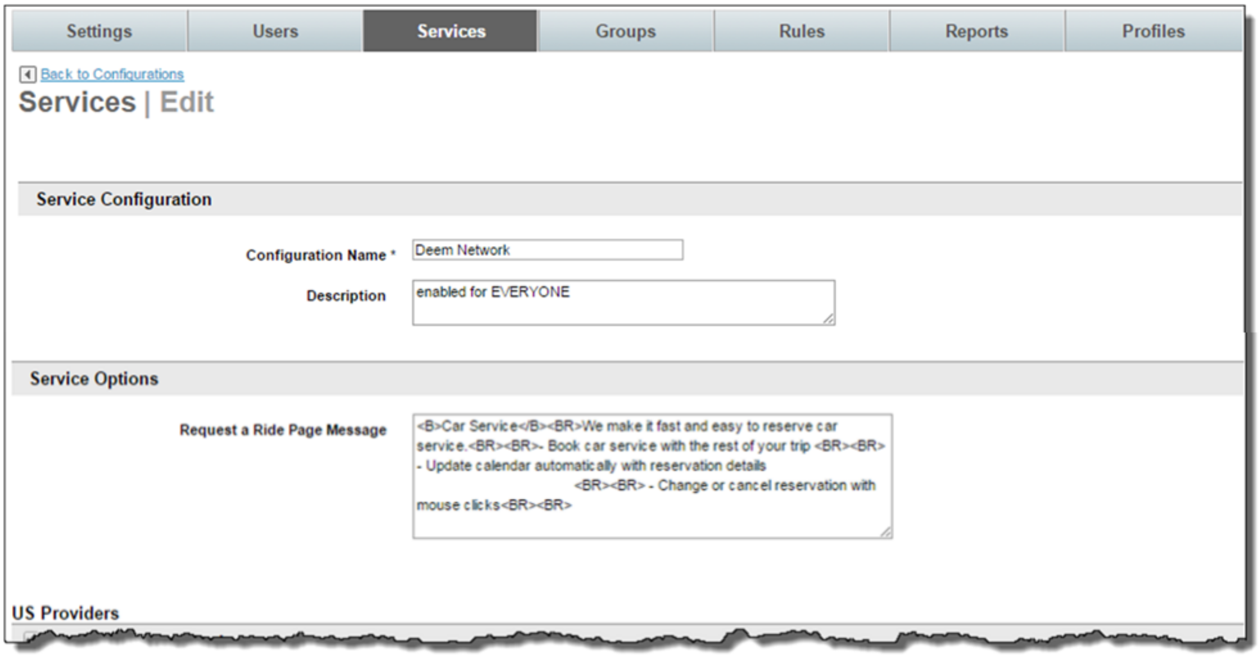
Services | Configurations

Configurations

Name	Description	Used in Rule
ABC co rates	preferred rates for abc co.	No
Deem Network	enabled for EVERYONE	Yes

Add A New Configuration

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


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Configurations

Services | Edit

Service Configuration

Configuration Name * Deem Network

Description enabled for EVERYONE

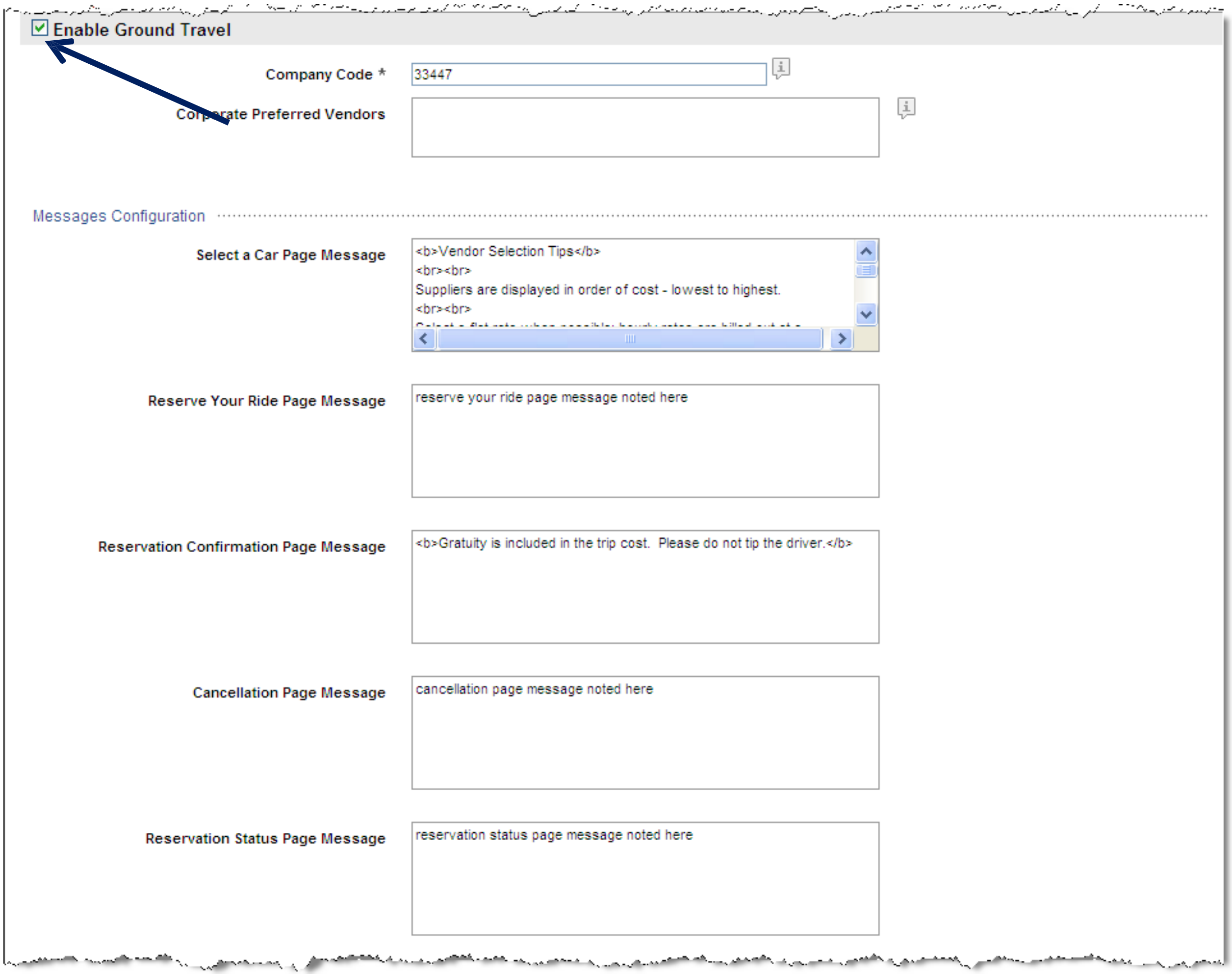
Service Options

Request a Ride Page Message <B>Car Service</B><BR>We make it fast and easy to reserve car service.<BR><BR>- Book car service with the rest of your trip <BR><BR> - Update calendar automatically with reservation details <BR><BR> - Change or cancel reservation with mouse clicks<BR><BR>

US Providers

- **Service Configuration:**
  - **Configuration Name:** We suggest the name of *Deem Network* for the configuration. This name will be easily recognizable as for the Deem Preferred Network.
  - **Description:** Provide an optional description for the configuration.
- **Service Options:**
  - **Request a Ride Page Message**: Default messaging is provided. Make changes as necessary.

3.2.1.1 US Providers



☑ Enable Ground Travel

Company Code * 33447

Corporate Preferred Vendors

Messages Configuration

Select a Car Page Message

```
<b>Vendor Selection Tips</b>
<br><br>
Suppliers are displayed in order of cost - lowest to highest.
<br><br>
```

Reserve Your Ride Page Message

```
reserve your ride page message noted here
```

Reservation Confirmation Page Message

```
<b>Gratuity is included in the trip cost.  Please do not tip the driver.</b>
```

Cancellation Page Message

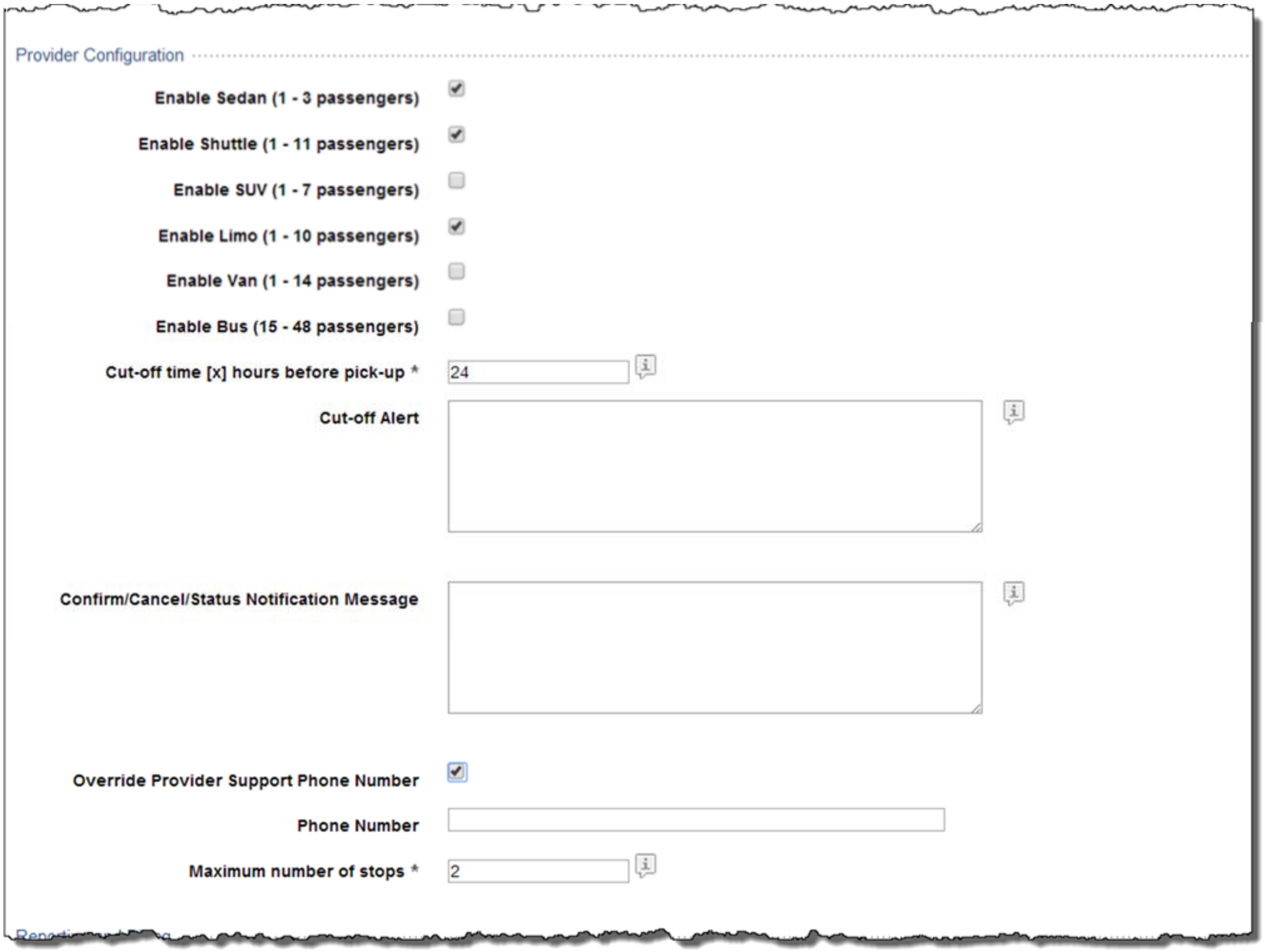
```
cancellation page message noted here
```

Reservation Status Page Message

```
reservation status page message noted here
```

- **Enable Ground Travel:** Select the checkbox to enable the car service.
  - **Company Code:** Enter *33447* to take part in the Deem Preferred Network
  - **Corporate Preferred Vendors**: To filter preferred vendors to the top of the results page, enter the preferred vendor codes here separated by commas, semicolons or spaces. These 3 digit codes must be provided by Deem. The gold icon encircling a P will also be displayed beside any preferred vendor.
- **Messages Configuration –**
  - **Select a Car Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Selection Page
  - **Reserve Your Ride Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Reservation Page.
  - **Reservation Confirmation Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Confirmation Page.
  - **Cancellation Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Cancellation Page.
  - **Reservation Status Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Reservation Status Page.

- **Provider Configuration -**



Provider Configuration

Enable Sedan (1 - 3 passengers)	☑
Enable Shuttle (1 - 11 passengers)	☑
Enable SUV (1 - 7 passengers)	☐
Enable Limo (1 - 10 passengers)	☑
Enable Van (1 - 14 passengers)	☐
Enable Bus (15 - 48 passengers)	☐
Cut-off time [x] hours before pick-up *	24
Cut-off Alert	
Confirm/Cancel/Status Notification Message	
Override Provider Support Phone Number	☑
Phone Number	
Maximum number of stops *	2

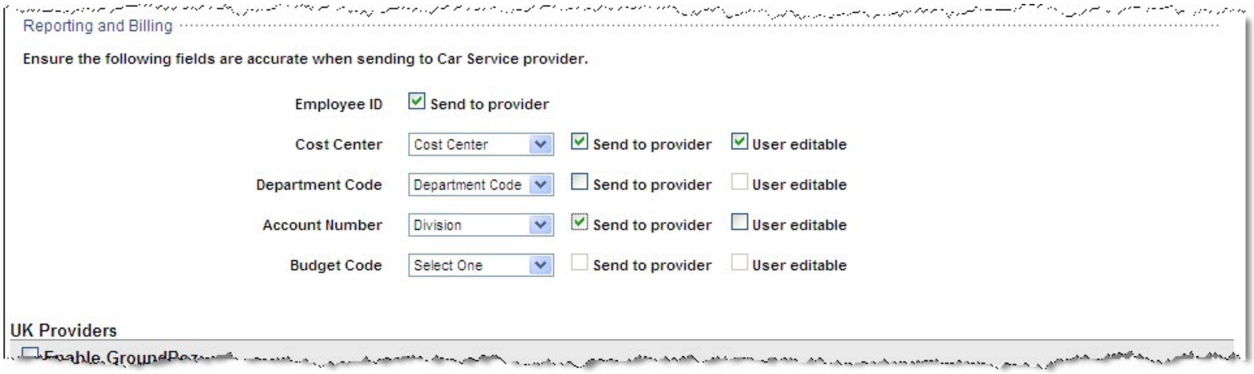
- **Enable Sedan (1 – 3 passengers):** Select the checkbox to allow this car size.
- **Enable Shuttle (1 – 11 passengers):** Select the checkbox to allow this car size.
- **Enable SUV (1 – 7 passengers):** Select the checkbox to allow this car size.
- **Enable Limo (1 – 10 passengers):** Select the checkbox to allow this car size.
- **Enable Van (1 – 14 passengers):** Select the checkbox to allow this car size.
- **Enable Bus (15 – 48 passengers):** Select the checkbox to allow this car size.
- **Cut-off time [x] hours before pick-up:** Specify the number of hours before a pick-up that the traveler can book, cancel or change a reservation. The number can be from 4 to 24.
- **Cut-Off Alert:** Enter the message using HTML tags or plain text that the traveler will receive if they attempt to book, cancel or change a reservation after the above cut-off time. If no alert message is entered, a default message will be displayed instructing the traveler to contact the service provider.
- **Confirmation / Cancel / Status Notification Message:** Enter the message using HTML tags or plain text to display to traveler on the confirmation, cancelation and status notification pages and emails.
- **Override Provider Support Phone Number:** Select this checkbox if an alternative support phone number will be entered. This could be the number for a VIP to use

instead of the number used by a member of the Everyone Group. If the checkbox is selected:

- **Phone Number:** Enter the phone number to use when calling support.

- **Maximum Stops:** Enter the maximum number of stops – up to 4 - IN ADDITION to the final destination allowed.

○ **Reporting and Billing –**



Reporting and Billing

Ensure the following fields are accurate when sending to Car Service provider.

Employee ID	☑ Send to provider		
Cost Center	Cost Center	☑ Send to provider	☑ User editable
Department Code	Department Code	☐ Send to provider	☐ User editable
Account Number	Division	☑ Send to provider	☐ User editable
Budget Code	Select One	☐ Send to provider	☐ User editable

UK Providers

☐ Enable GroundRe

- **Employee ID:** Select this checkbox if the traveler's employee ID must be transmitted to the car service provider for reporting and or billing purposes.

Note: Values for the following 4 fields can be defined in the **Profile Field Settings** link on the Settings Tab. Edit the display label, data source, and when to display or require the field by selecting the **Configure Profile Fields** link. Customize these fields further by going to the **Customize Profile Fields** link.

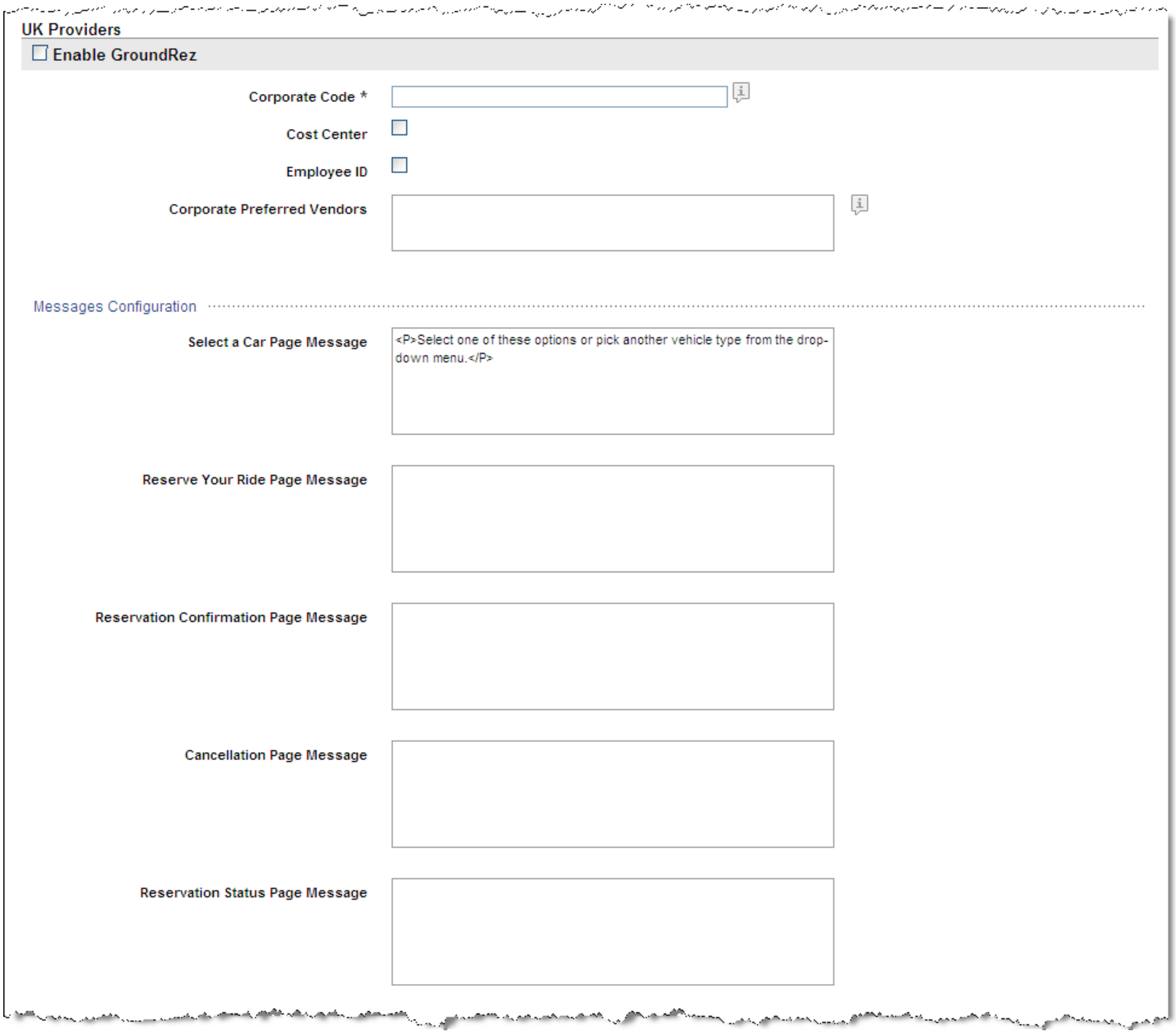
- **Cost Center:**
  - Select the field name from the drop down list to designate the field whose value will be transmitted to the provider if the **Send to provider** checkbox is selected.
  - Select the **Send to provider** checkbox to send the value of the field selected from the drop down list to the provider for reporting or billing purposes.
  - Select the **User editable** checkbox if the user may edit the value found in their profile on the car service purchase page. The value is used for reporting and billing purposes and does not replace the profile value.
- **Department Code:**
  - Select the field name from the drop down list to designate the field whose value will be transmitted to the provider if the **Send to provider** checkbox is selected.
  - Select the **Send to provider** checkbox to send the value of the field selected from the drop down list to the provider for reporting or billing purposes.
  - Select the **User editable** checkbox if the user may edit the value found in their profile on the car service purchase page. The value is used for reporting and billing purposes and does not replace the profile value.

Note: Field names for **Account Number** and **Budget Code** may be displayed in {Brackets}. This indicates that the field name for one of the "MIS Fields" has been changed in the **Customize Profile Fields** function on the Settings Tab

- **Account Number:**
  - Select the field name from the drop down list to designate the field whose value will be transmitted to the provider if the **Send to provider** checkbox is selected.

  - Select the **Send to provider** checkbox to send the value of the field selected from the drop down list to the provider for reporting or billing purposes.
  - Select the **User editable** checkbox if the user may edit the value found in their profile on the car service purchase page. The value is used for reporting and billing purposes and does not replace the profile value.
- **Budget Code:**
  - Select the field name from the drop down list to designate the field whose value will be transmitted to the provider if the **Send to provider** checkbox is selected.
  - Select the **Send to provider** checkbox to send the value of the field selected from the drop down list to the provider for reporting or billing purposes.
  - Select the **User editable** checkbox if the user may edit the value found in their profile on the car service purchase page. The value is used for reporting and billing purposes and does not replace the profile value.

3.2.1.2 UK Providers:



UK Providers

☐ Enable GroundRez

Corporate Code *

Cost Center ☐

Employee ID ☐

Corporate Preferred Vendors

Messages Configuration

Select a Car Page Message

<P>Select one of these options or pick another vehicle type from the drop-down menu.</P>

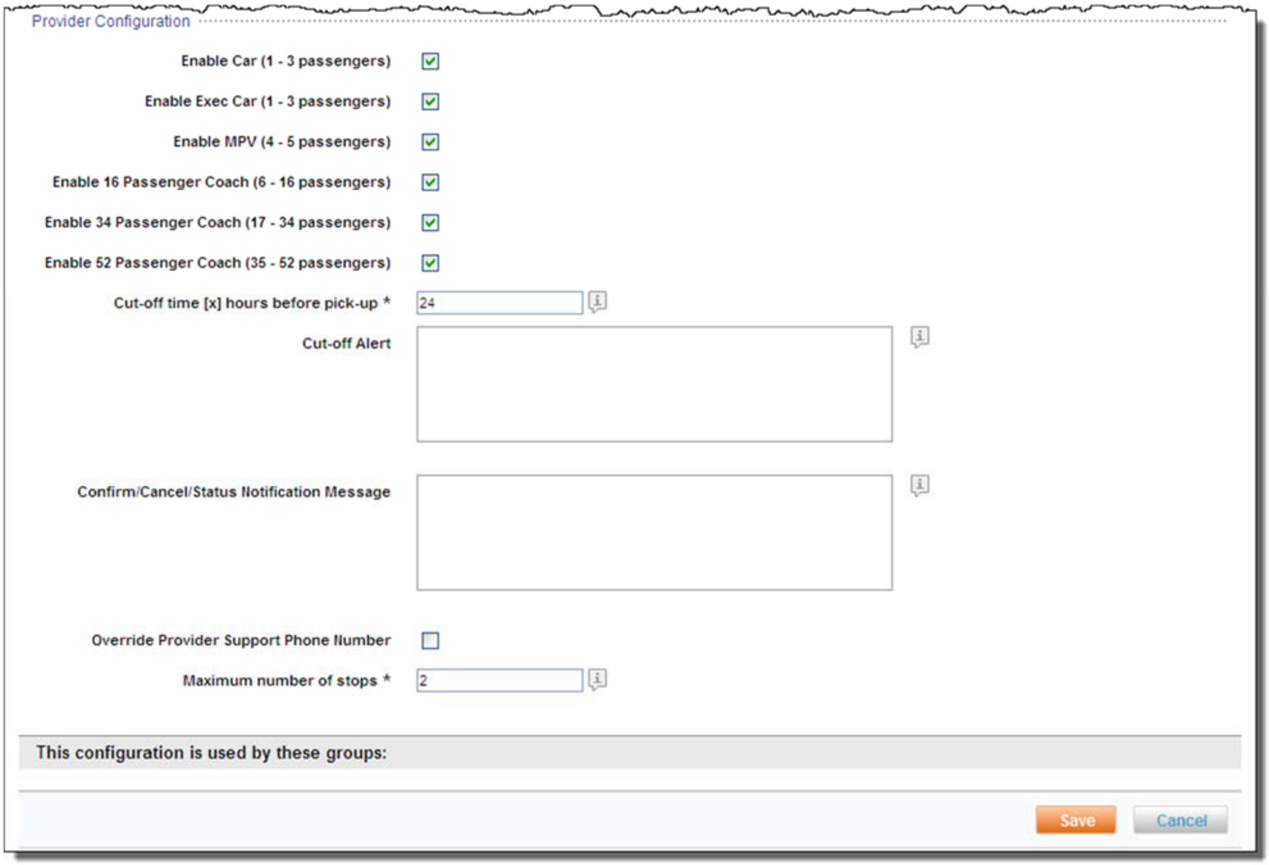
Reserve Your Ride Page Message

Reservation Confirmation Page Message

Cancellation Page Message

Reservation Status Page Message

- **Enable GroundRez:** Select the checkbox to enable car service in the UK.
- **Corporate Code:** Enter the code received from the Deem Configuration Team for the Deem preferred provider. This is a required field.
- **Cost Center:** Select this checkbox if the traveler's cost center must be transmitted to the car service provider for reporting purposes.
- **Employee ID:** Select this checkbox if the traveler's employee ID must be transmitted to the car service provider for reporting purposes.
- **Corporate Preferred Vendors**: To filter preferred vendors to the top of the results page, enter the vendor codes here. These 3 digit codes must be provided by Deem.
- **Messages Configuration -**
  - **Select a Car Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Selection Page
  - **Reserve Your Ride Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Selection Page.
  - **Reservation Confirmation Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Confirmation Page.
  - **Cancellation Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Cancellation Page.
  - **Reservation Status Page Message:** Enter the message using HTML tags or plain text to be displayed on the Car Service Reservation Status Page.
- **Provider Configuration –**



Provider Configuration

Enable Car (1 - 3 passengers)	☑
Enable Exec Car (1 - 3 passengers)	☑
Enable MPV (4 - 5 passengers)	☑
Enable 16 Passenger Coach (6 - 16 passengers)	☑
Enable 34 Passenger Coach (17 - 34 passengers)	☑
Enable 52 Passenger Coach (35 - 52 passengers)	☑
Cut-off time [x] hours before pick-up *	24
Cut-off Alert	
Confirm/Cancel/Status Notification Message	
Override Provider Support Phone Number	☐
Maximum number of stops *	2

This configuration is used by these groups:

  - **Enable Car (1 – 3 passengers):** Select the checkbox to allow this car size.
  - **Enable Exec Car (1 – 3 passengers):** Select the checkbox to allow this car size.

- **Enable MPV (4 - 5 passengers):** Select the checkbox to allow this car size.
- **Enable 16 Passenger Coach (6 - 16 passengers):** Select the checkbox to allow this car size.
- **Enable 34 Passenger Coach (17 - 34 passengers):** Select the checkbox to allow this car size.
- **Enable 52 Passenger Coach (35 - 52 passengers):** Select the checkbox to allow this car size.
- **Cut-off time [x] hours before pick-up:** Specify the number of hours before a pick-up that the traveler can book, cancel or change a reservation. The number can be from 4 to 24.
- **Cut-Off Alert:** Enter the message using HTML tags or plain text that the traveler will receive if they attempt to book, cancel or change a reservation after the above cut-off time. If no alert message is entered, a default message will be displayed instructing the traveler to contact the service provider.
- **Confirmation / Cancel / Status Notification Message:** Enter the message using HTML tags or plain text to display to traveler on the confirmation, cancelation and status notification pages and emails.
- **Override Provider Support Phone Number:** Select this checkbox if an alternative support phone number is to be entered. This could be the number for a VIP to use instead of the number used by a member of the Everyone Group. If the checkbox is selected:
    - **Phone Number:** Enter the phone number to use.
- **Maximum Stops:** Enter the maximum number of stops – up to 3 - IN ADDITION to the final destination allowed.

5. Click **Save** to save the configuration. Click **Back to Car Service** to return to the Car Service Overview page.

3.2.2 Corporate Custom Rates Configuration

The process to enable a Car Service using a site's predetermine Custom Rates:

1. Submit a request to Deem Support to determine if the vendor is an approved Deem Car Service vendor.
2. Complete the Deem Car Service form. Return the completed form to Deem Support.
3. The Car Service Provider must provide a file meeting all technical requirements for online booking.
4. Follow process to configure Deem Preferred Network with the following exceptions:

x **Service Configuration:**

- **Configuration Name:** Use a name that is easily recognizable as a custom rates vendor.
- **Description:** Provide an optional description for the configuration.

x **US Providers:**

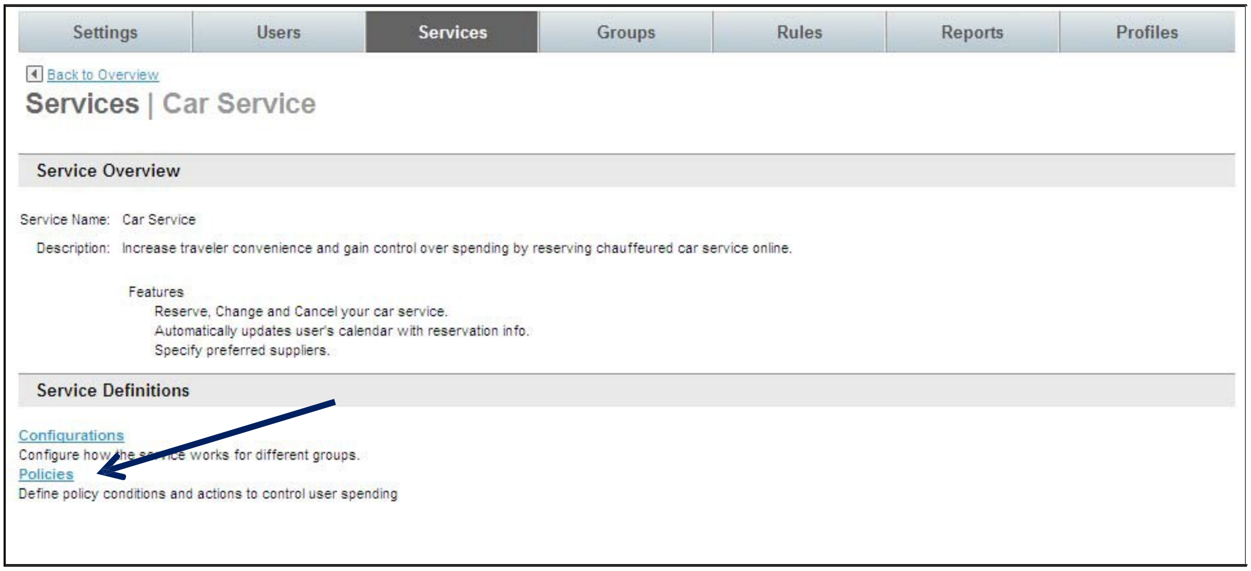
- **Company Code:** Enter the code received from Deem as the custom rates vendor code

5. Click **Save** to save the configuration. Click **Back to Car Service** to return to the Car Service Overview page.

3.2.3 Car Service Policy

Upon configuration of the service, all selections from the search results page would be considered within policy. To control company spend or car service selection, policies would need to be configured that specify what would be defined as *Out of Policy – Allowed* or *Out of Policy – Not Allowed.*

1. Click the **Services Tab** then the **Car Service** link in the **Travel** section of the page.
2. The **Services** | **Car Service** page is displayed. Click the **Policies** link to configure policy.



Services | Car Service

Service Overview

Service Name: Car Service

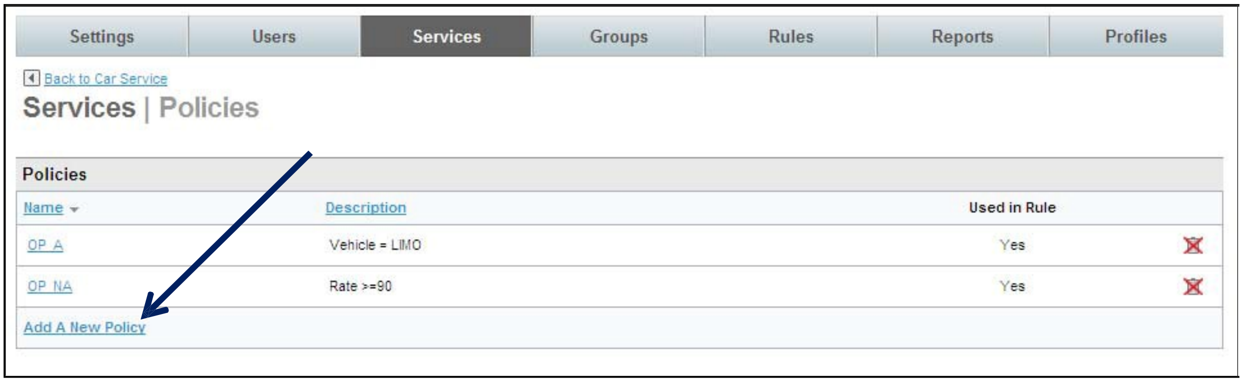
Description: Increase traveler convenience and gain control over spending by reserving chauffeured car service online.

Features
- Reserve, Change and Cancel your car service.
- Automatically updates user's calendar with reservation info.
- Specify preferred suppliers.

Service Definitions

Configurations
Configure how the service works for different groups.
Policies
Define policy conditions and actions to control user spending

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

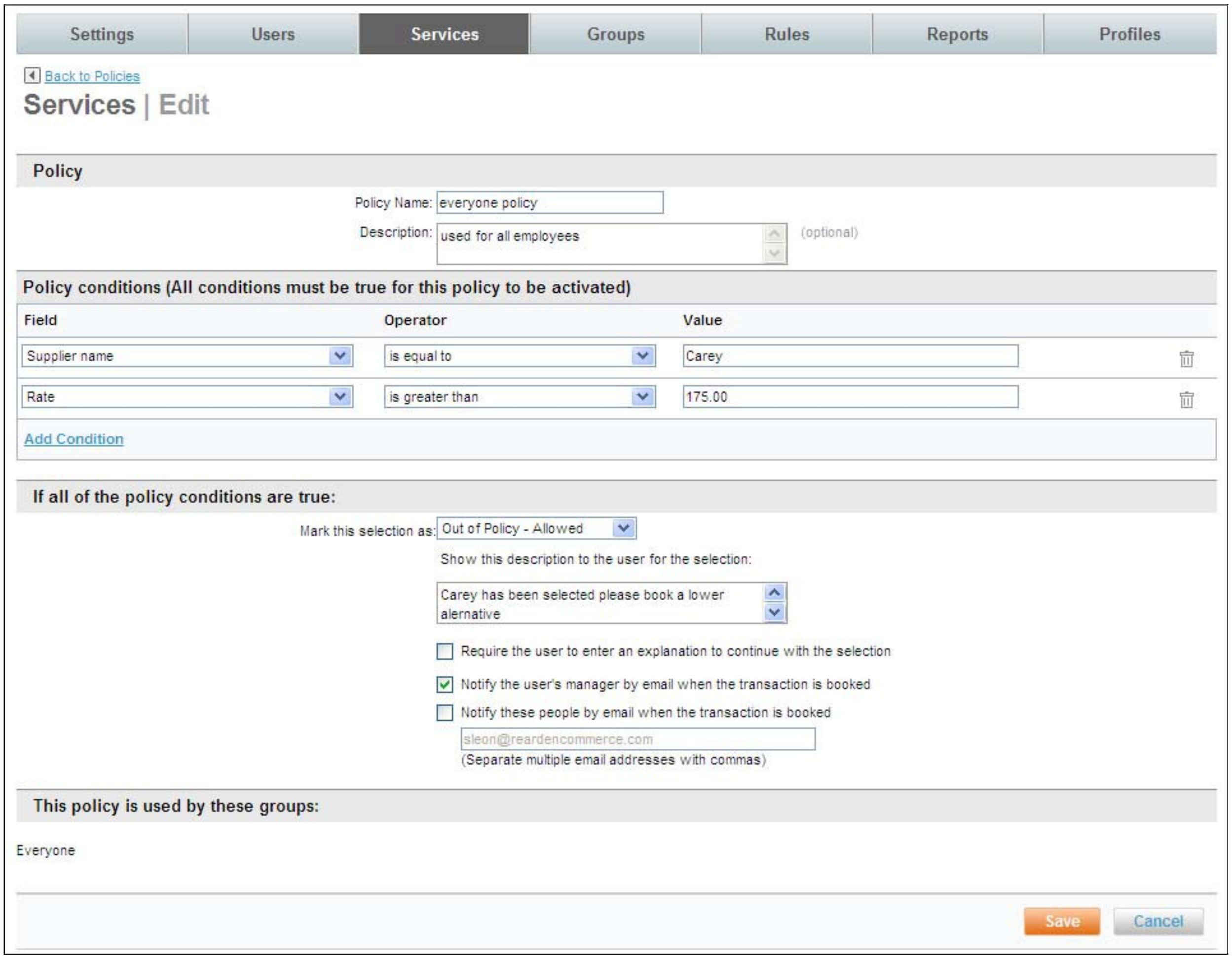


Services | Policies

Policies

Name	Description	Used in Rule	
OP_A	Vehicle = LIMO	Yes	☒
OP_NA	Rate >=90	Yes	☒
Add A New Policy			

4. The **Services | Edit** page is displayed. Complete the page:



Services | Edit

Policy

Policy Name: everyone policy

Description: used for all employees (optional)

Policy conditions (All conditions must be true for this policy to be activated)

Field	Operator	Value
Supplier name	is equal to	Carey
Rate	is greater than	175.00

Add Condition

If all of the policy conditions are true:

Mark this selection as: Out of Policy - Allowed

Show this description to the user for the selection:

Carey has been selected please book a lower alernative

☐ Require the user to enter an explanation to continue with the selection

☑ Notify the user's manager by email when the transaction is booked

☐ Notify these people by email when the transaction is booked

sleon@reardencommerce.com

(Separate multiple email addresses with commas)

This policy is used by these groups:

Everyone

- **Policy:**
  - **Policy Name:** Name the policy to be easily recognizable as a specific car service policy. An example is *VIP Car Service* to show that this configuration is for VIP travelers or *Everyone Policy* for use by all travelers.
  - **Description:** Enter an optional policy description.
- **Policy conditions (All conditions must be true for this policy to be activated):**
  - **Field:** Select the field to use to define this policy

Field	**Operator**	
Provider name Supplier name Vehicle class Rate type	Is equal to Is not equal to Contains Does not contain	Is in list Is not in list Starts with Ends with
Pick-up Date	Is equal to Is not equal to After	Is in list Is not in list

	Before	
Rate	Is equal to Is not equal to Is greater than Is greater than or equal to	Is less than Is less than or equal to Is in list Is not in list

- ○ **Value:** Enter the value to use to determine if the field / operator is out of policy. Examples: When Supplier name is equal to Carey the selection is Out of Policy - Allowed, or if Rate is greater than 175.00 the selection is Out of Policy – Not allowed.

ƒ **If all of the policy conditions are true:**

- ○ **Mark this selection as:**
  - **Out of Policy – Allowed:** Selection has been allowed, but traveler can proceed to book selected plans
  - **Out of Policy – Not allowed:** Selection has not been allowed. Traveler must make another selection.
- ○ **Show this description to the user for the selection:**
  - Enter a message using plain text or HTML tags to display to the traveler when the selection meets the criteria configured above.
- ○ **Require the user to enter an explanation to continue with the selection:** By selecting this checkbox, the traveler would see an additional text box asking them to supply an explanation as to why they believe their selection should be allowed.
- ○ **Notify the user's manager by email when the transaction is booked:** By selecting this checkbox, they traveler's manager, as noted on the traveler's profile, would receive an email when the "Out of policy – Allowed" booking was completed.
- ○ **Notify these people by email when the transaction is booked:** By selecting this checkbox, emails would be sent to the addresses entered in the box provided when a transaction is booked that is "Out of policy – Allowed". Separate multiple email address with commas.

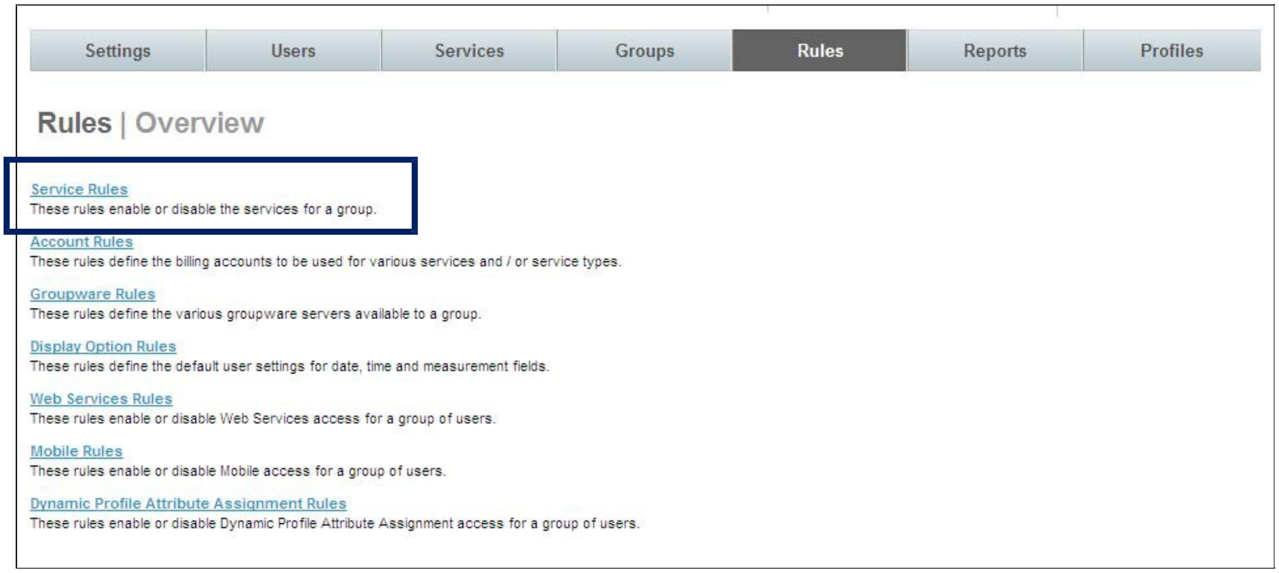
5. Click **Save** to save the policy. Click the **Return to Car Service** link to return to the Car Service Overview page.

3.2.4 Car Service Rules

Once the service and policy have been configured, add the service to a group of travelers.

To add the service to **Rules:**

1. Click the **Rules** tab. The **Rules | Overview** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles

Rules | Overview

Service Rules
These rules enable or disable the services for a group.

Account Rules
These rules define the billing accounts to be used for various services and / or service types.

Groupware Rules
These rules define the various groupware servers available to a group.

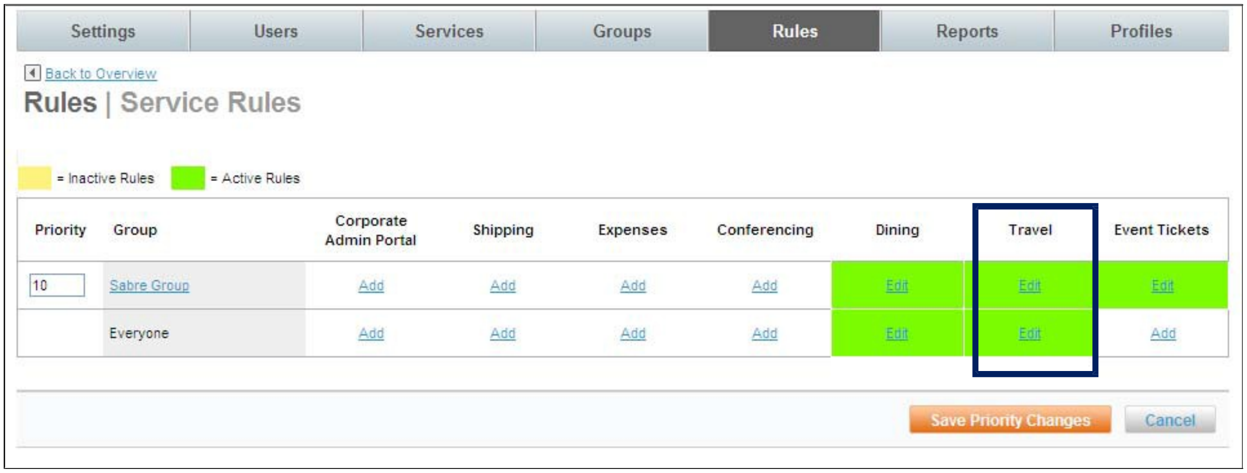
Display Option Rules
These rules define the default user settings for date, time and measurement fields.

Web Services Rules
These rules enable or disable Web Services access for a group of users.

Mobile Rules
These rules enable or disable Mobile access for a group of users.

Dynamic Profile Attribute Assignment Rules
These rules enable or disable Dynamic Profile Attribute Assignment access for a group of users.

2. Click the **Service Rules** link. The **Rules | Service Rules** page is displayed.

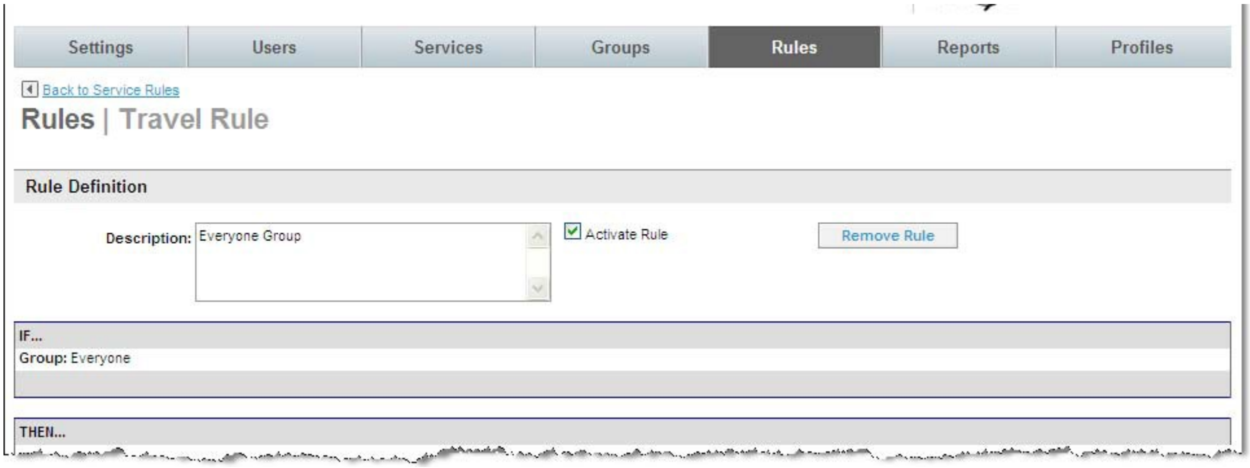

Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Overview
Save Priority Changes
Cancel

Rules | Service Rules

🟨 = Inactive Rules 🟩 = Active Rules

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Event Tickets
10	Sabre Group	Add	Add	Add	Add	Edit	Edit	Edit
	Everyone	Add	Add	Add	Add	Edit	Edit	Add

3. Locate the group for which to allow car service and click on the **Add** or **Edit** link found in the **Travel** column. The **Rules | Travel Rule** page is displayed.


Settings
Users
Services
Groups
Rules
Reports
Profiles
Back to Service Rules
Remove Rule

Rules | Travel Rule

Rule Definition

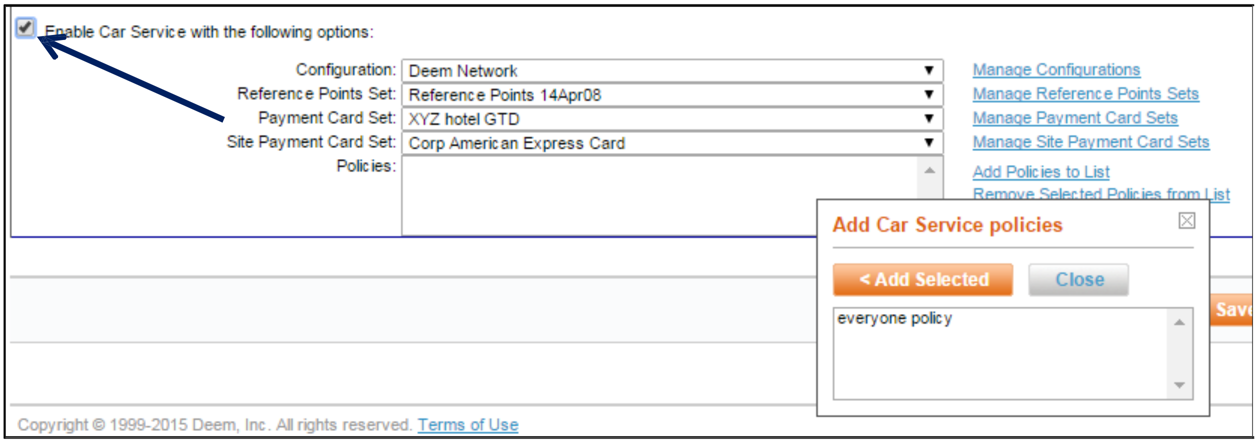
Description: Everyone Group

☑ Activate Rule

IF...
Group: Everyone

THEN...

4. Scroll down to the bottom of the page to the **Enable Car Service** service with the following options section:



☑ Enable Car Service with the following options:

Configuration: Deem Network
Reference Points Set: Reference Points 14Apr08
Payment Card Set: XYZ hotel GTD
Site Payment Card Set: Corp American Express Card
Policies:

Add Car Service policies

everyone policy

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Manage Configurations
Manage Reference Points Sets
Manage Payment Card Sets
Manage Site Payment Card Sets
Add Policies to List
Remove Selected Policies from List
< Add Selected
Close
Sav

5. Select the **Enable Car Service service with the following options:** checkbox to enable this service for the group.
6. Click the **Configuration** drop down list and select the appropriate configuration for this group.
7. Click the **Reference Points Set** drop down list and select the appropriate set which will provide starting point locations for radius searches. Corporate reference points used for travel can also be used for car service. The office location(s) defined in the file will pre-populate the pick-up or drop off location in the Ride Details Page on the Deem site.
8. Click the **Payment Card Set** drop down list and select the appropriate set, if a default payment card will be used for booking the service.
9. Click the **Site Payment Card Set** drop down list and select the appropriate set, if a site card will be used for booking the service.
10. Click the **Add Policy to List** link to select the appropriate policy for this group.

    x Click the policy name and then the **Add Selected** button to select the policy and the **Close** button to close the selection box.

11. Click **Save** to save the Service Rule change.
12. Click the **Changes not applied** link to commit the changes. The group of travelers will now see the car service option and receive out of policy notification if appropriate.

4 Support Case Entry

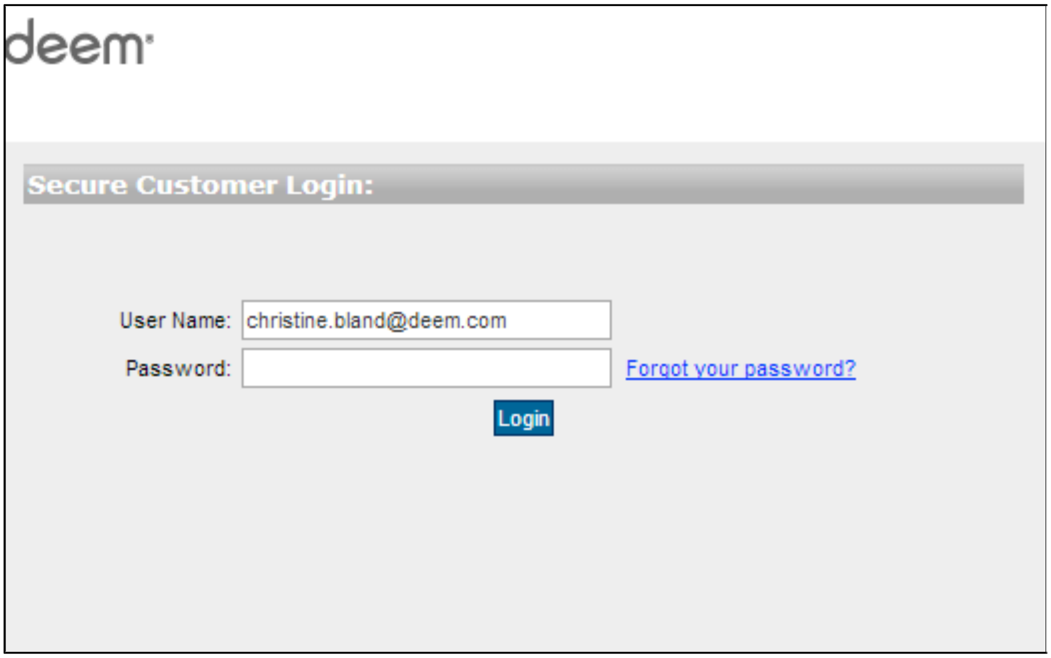
Support Cases are entered for many different reasons. They may be the result of testing that doesn't go exactly as you hoped, or they can contain questions. In this section we will cover how to enter a Support Case that effectively identifies your issue.

4.1 Reporting an Urgent Issue

First, determine the Urgency of the Request. If you are **Reporting an Urgent Issue -** Including site outages, major feature failures & other emergencies involving major feature / service failure or ALL users, with NO workaround, **Call 1-888-753-2580 – 24 hours** / **7 days a week** first and then enter a Support Case to be used for tracking the issue.

4.2 Entering a Support Case for All Issues

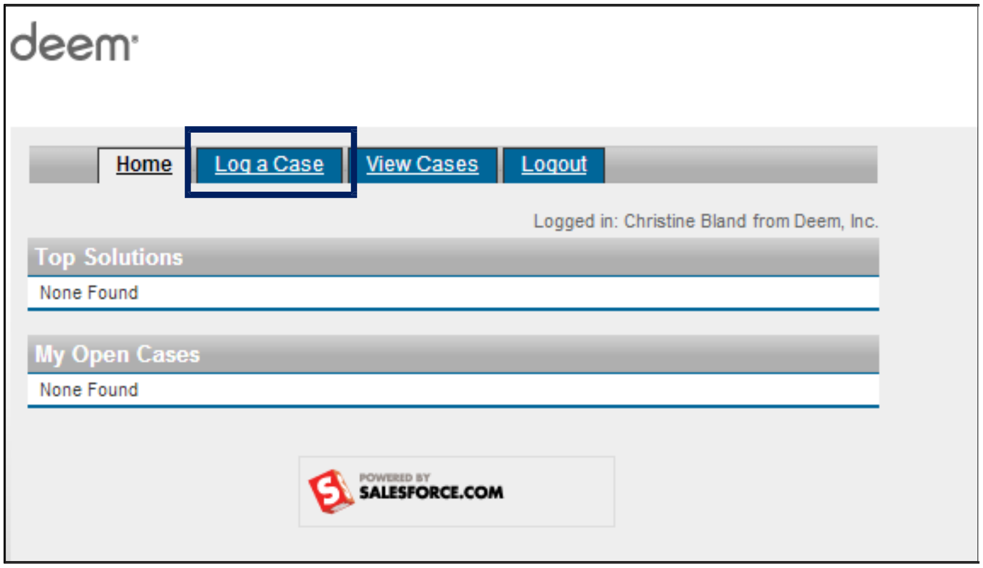
1. Sign into the **Customer Support Portal** found at **http://support.deem.com/** using your email address as the **User Name** and enter your **Password**.


deem
Secure Customer Login:
Forgot your password?
Login

User Name: christine.bland@deem.com

Password:

2. The **Home** page is displayed. Click the **Log a Case** tab to report an issue.

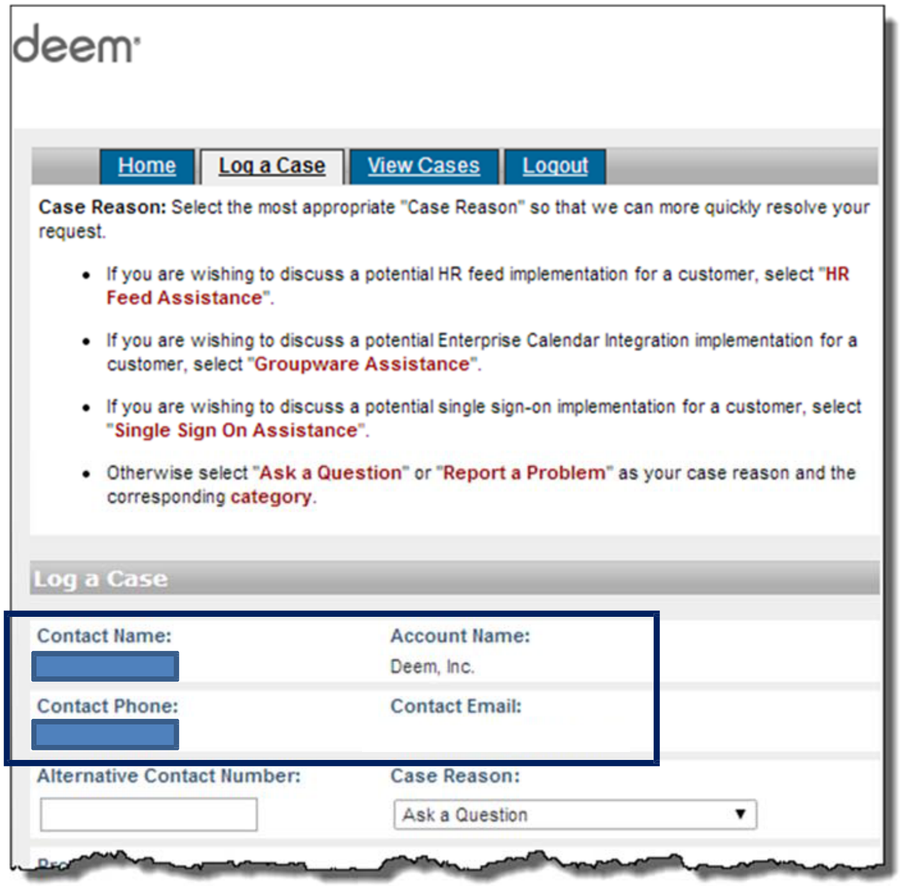

deem
Home
Log a Case
View Cases
Logout
Top Solutions
My Open Cases
POWERED BY SALESFORCE.COM

Logged in: Christine Bland from Deem, Inc.

Top Solutions: None Found

My Open Cases: None Found

3. The **Log a Case** page is displayed. The **Contact Name**, **Account Name**, **Contact Phone** and **Contact email** fields will be pre-populated with the information associated to your profile.



Case Reason: Select the most appropriate "Case Reason" so that we can more quickly resolve your request.

- If you are wishing to discuss a potential HR feed implementation for a customer, select "**HR Feed Assistance**".
- If you are wishing to discuss a potential Enterprise Calendar Integration implementation for a customer, select "**Groupware Assistance**".
- If you are wishing to discuss a potential single sign-on implementation for a customer, select "**Single Sign On Assistance**".
- Otherwise select "**Ask a Question**" or "**Report a Problem**" as your case reason and the corresponding **category**.

Log a Case

Contact Name: [redacted]

Account Name: Deem, Inc.

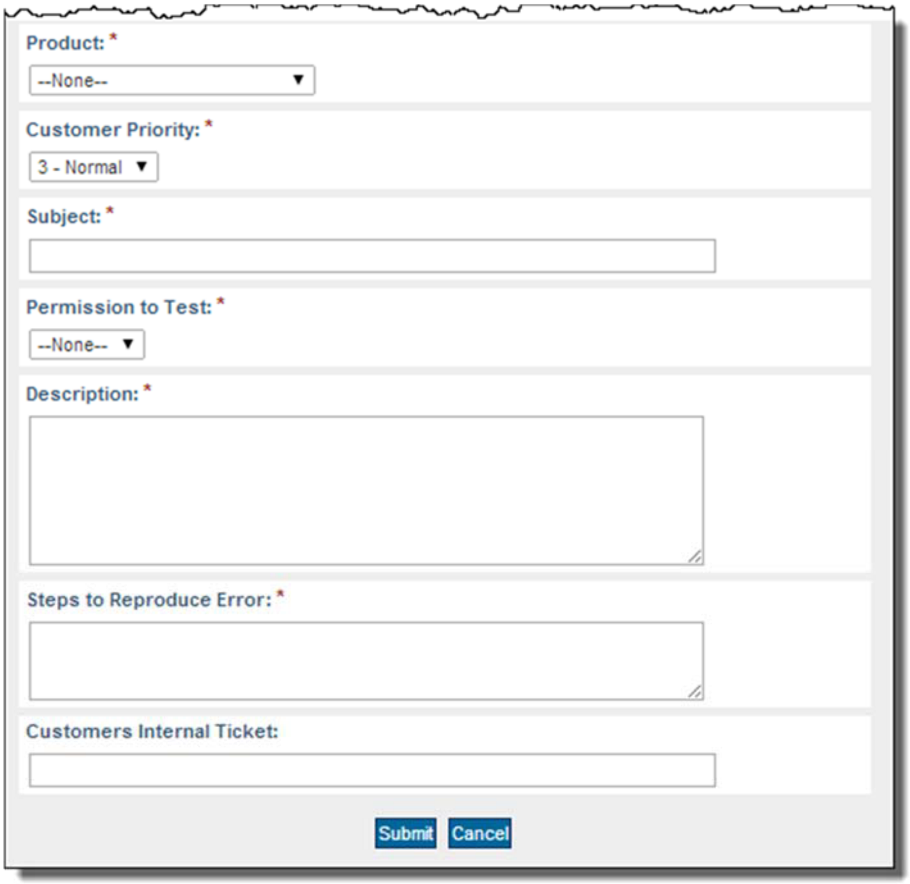
Contact Phone: [redacted]

Contact Email:

Alternative Contact Number:

Case Reason: Ask a Question

Scroll down to see bottom of the page:



Product: *

--None--

Customer Priority: *

3 - Normal

Subject: *

Permission to Test: *

--None--

Description: *

Steps to Reproduce Error: *

Customers Internal Ticket:

- Note required fields marked with an "*":
  - Case Reason
  - Product
  - Customer Priority
  - Subject
  - Permission to Test
  - Description
  - Steps to Reproduce Error

4. Select a **Product** from the drop down list. Products include:
   - Airport Parking
   - False Ticket
   - Mobile
   - Offers
   - Purchase
   - Travel
   - User Access
   - Non-supported end user
   - Database Feeds and Reports
   - and others

5. Determine the **Urgency of the Request:**

Reporting an Urgent Issue -

- ○ **Urgent Issues** – Including site outages, major feature failures & other emergencies involving major feature / service failure for ALL users, with NO workaround
    - **Call 1-888-753-2580 – 24 hours / 7 days a week**
    - Enter a Support Case at support.deem.com
    - Deem will respond as defined in customer agreement
    - Defect/Issue Resolution: ASAP

Note: After calling the number, please enter a case. The case is used for tracking the resolution progress.

Reporting a Non-Urgent Issue or Request:

- ○ **Normal Issues** – Including major feature failure with a reasonable work around, feature failure for a limited number of users, non-urgent configuration requests and cosmetic issues
    - Use the **Customer Support Portal**
    - Deem will respond as defined in customer agreement
    - Defect/Issue Resolution: Next commercially reasonable opportunity
- ○ **Customer Support Portal – found at http://support.deem.com/**
    - **Determine the Type of Request**
        - Need a site configuration change? Select “Configuration Request”
        - Need HR feed or user profile upload help? Select “HR Feed Assistance”
        - Need GDS profile synchronization help? Select “Groupware Assistance”
        - Need single sign-on help? Select “Single Sign On Assistance”
        - Need to ask a question? Select “Ask a question”
        - For any other help: Select “Report a Problem"

6. Determine the **Priority:**

1 - Urgent - Crash / Data Loss

2 - High - Major / No Workaround

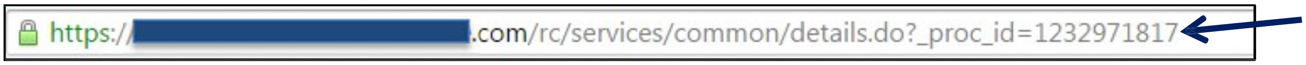
3 - Normal - Minor / Workaround

4 - Low - Cosmetic / Trivial

7. Complete the remaining fields:

x **Select the Case Category** from the drop down list
x **Enter the Case Subject** that provides a summary of what you are experiencing
x **Enter the Case Description**: Provide a more detailed description of the issue

- ○ Include the site name where the issue is occurring
- ○ Include the Process ID if possible - found at the end of the URL on the Trip Details page



https://[redacted].com/rc/services/common/details.do?_proc_id=1232971817

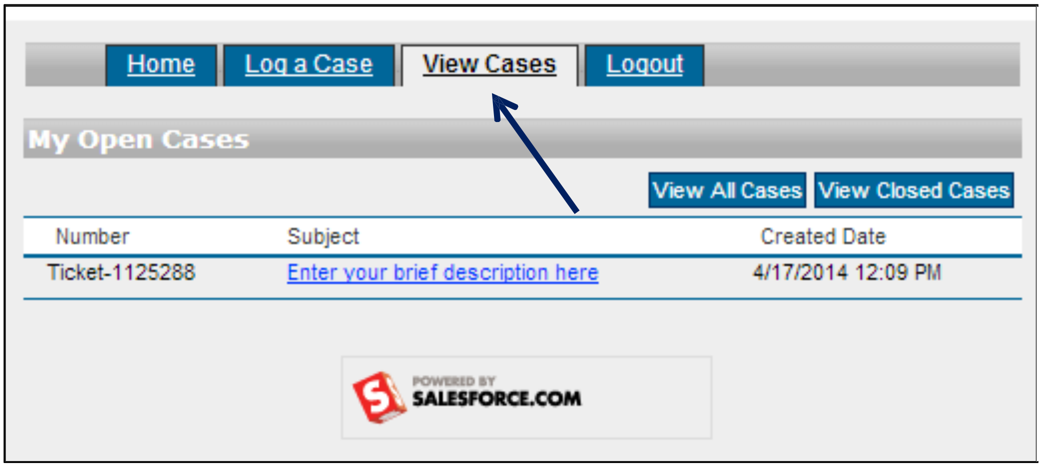
- ○ If you are using a generic Support Portal log in, provide your contact information
- ○ Provide the name of the user who is experiencing the issue
- ○ Provide specific Steps to reproduce the issue

8. Click the **Submit** button at the bottom of the page.

Note - Attachments / comments can be added after the case is submitted.

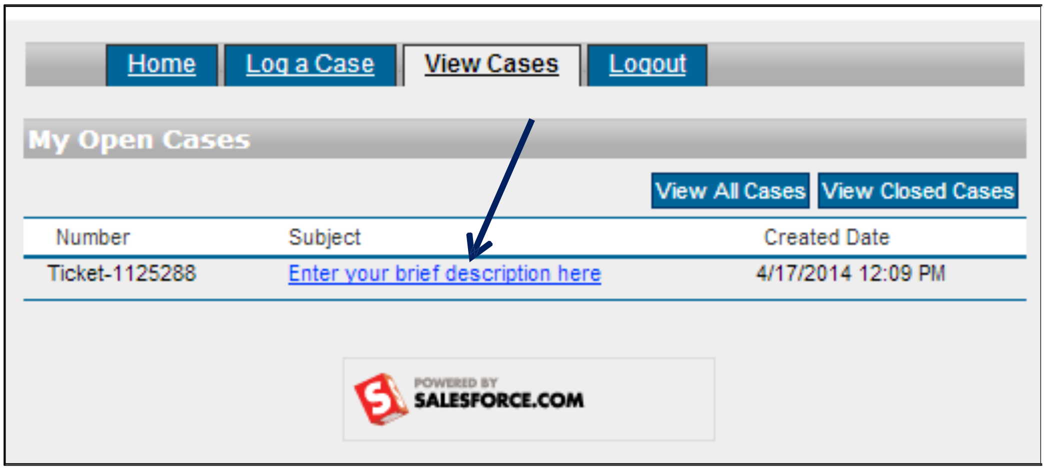
4.3 *Viewing an Existing Case (Entering Comments and Attachments)*

1. Sign into the **Customer Support Portal** using your email address as the **User Name** and **Password**.
2. The **Home** page is displayed. Click the **View Cases** tab to view an existing issue.


Home
Log a Case
View Cases
Logout
My Open Cases
View All Cases
View Closed Cases
POWERED BY SALESFORCE.COM

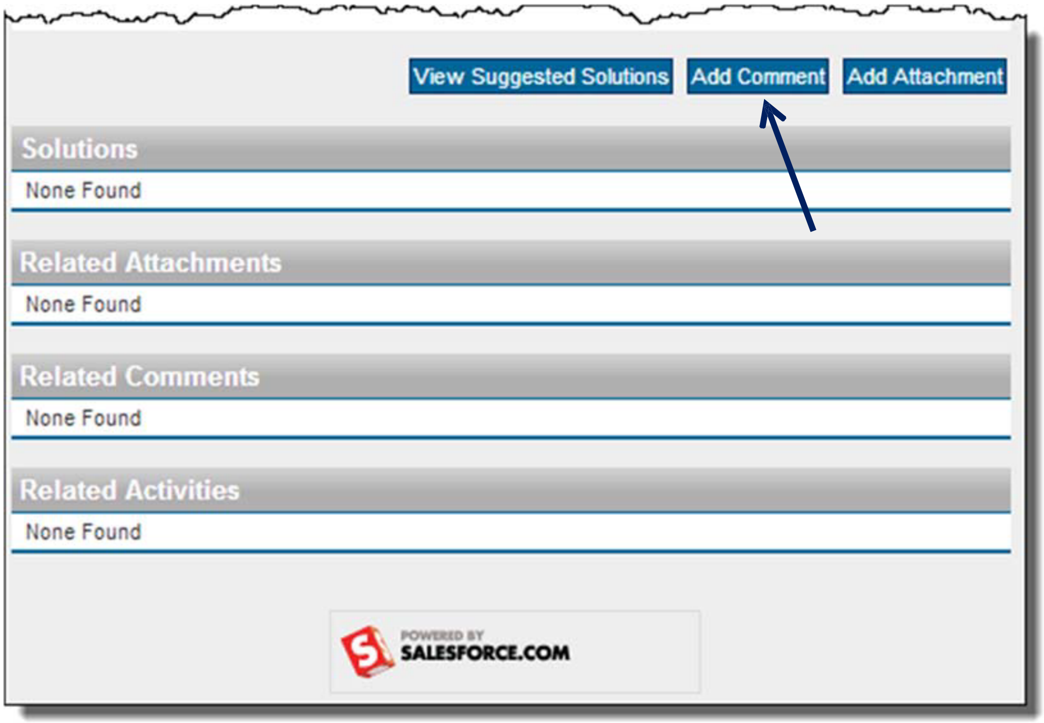
Number	Subject	Created Date
Ticket-1125288	Enter your brief description here	4/17/2014 12:09 PM

3. While on the **View Cases** tab, click the **Subject** link of the case to view the case.

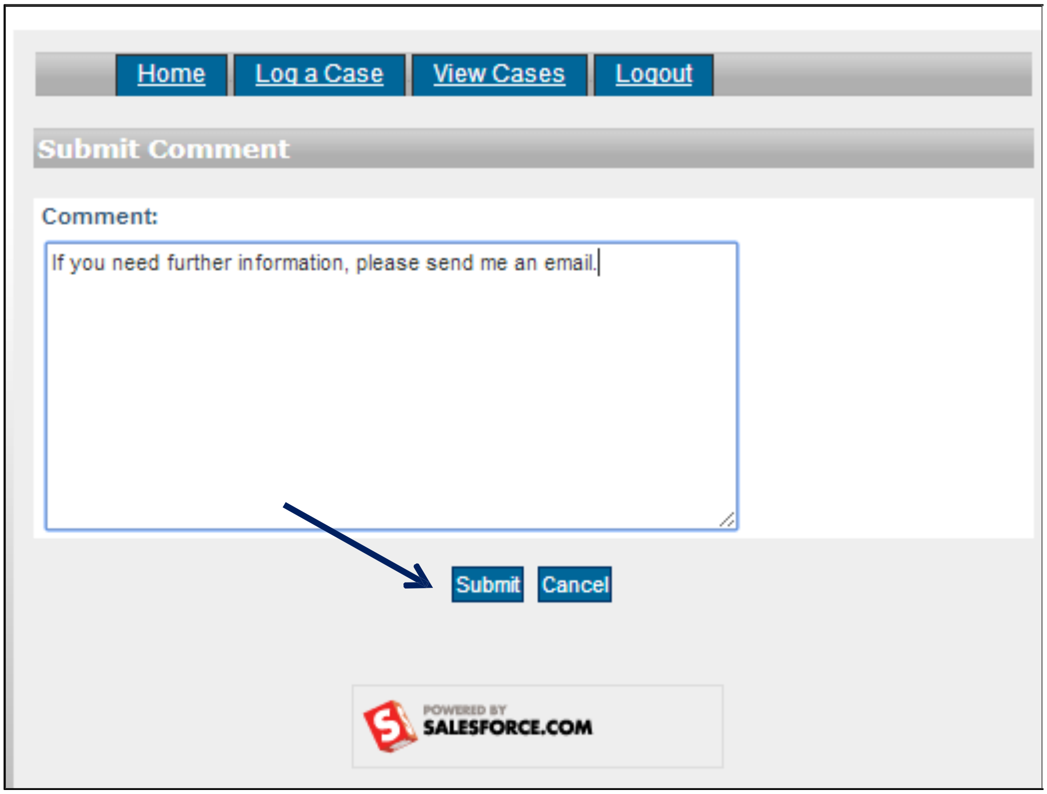

Home
Log a Case
View Cases
Logout
My Open Cases
View All Cases
View Closed Cases
POWERED BY SALESFORCE.COM

Number	Subject	Created Date
Ticket-1125288	Enter your brief description here	4/17/2014 12:09 PM

4. Scroll down to the bottom of the page and click the **Add Comment** tab to add a comment to this case.

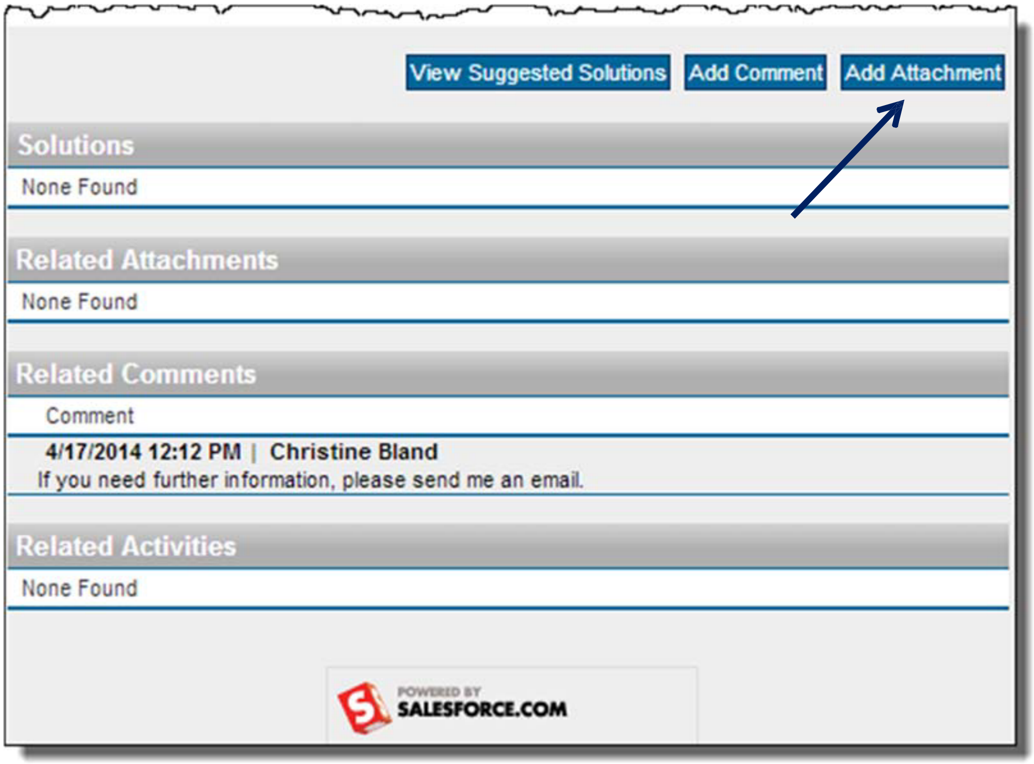

View Suggested Solutions
Add Comment
Add Attachment
Solutions
None Found
Related Attachments
None Found
Related Comments
None Found
Related Activities
None Found
POWERED BY SALESFORCE.COM

- Add your comments and click **Submit.**


Home
Log a Case
View Cases
Logout
Submit Comment
Comment:
Submit
Cancel
POWERED BY SALESFORCE.COM

If you need further information, please send me an email.

5. Add attachments by
   a. Selecting the **Add Attachment** tab.

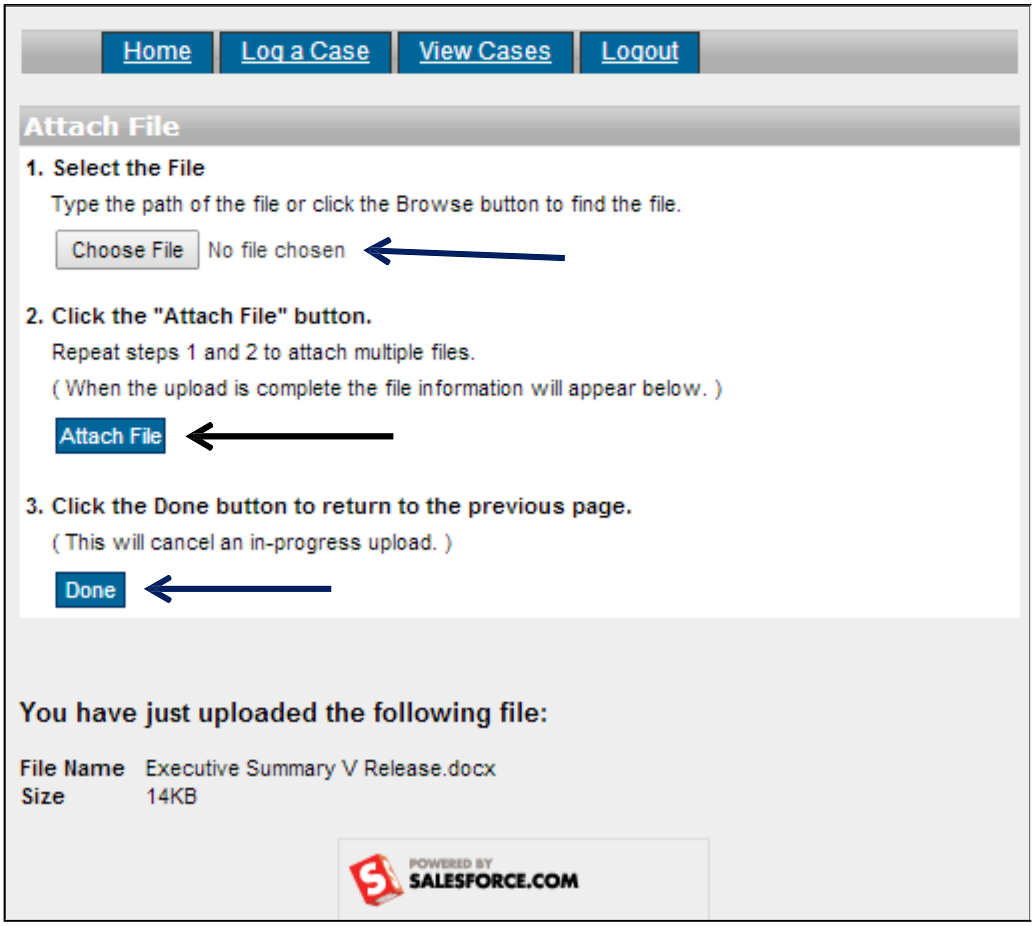

View Suggested Solutions
Add Comment
Add Attachment
Solutions
None Found
Related Attachments
None Found
Related Comments
Comment

4/17/2014 12:12 PM | Christine Bland
If you need further information, please send me an email.

Related Activities
None Found
POWERED BY SALESFORCE.COM

   b. **Browse** for the file, select it and click **Attach File**.

c. Click **Done** when you have completed attaching files.



Home
Log a Case
View Cases
Logout

Attach File

1. Select the File

Type the path of the file or click the Browse button to find the file.

Choose File
No file chosen

2. Click the "Attach File" button.

Repeat steps 1 and 2 to attach multiple files.

(When the upload is complete the file information will appear below.)

Attach File

3. Click the Done button to return to the previous page.

(This will cancel an in-progress upload.)

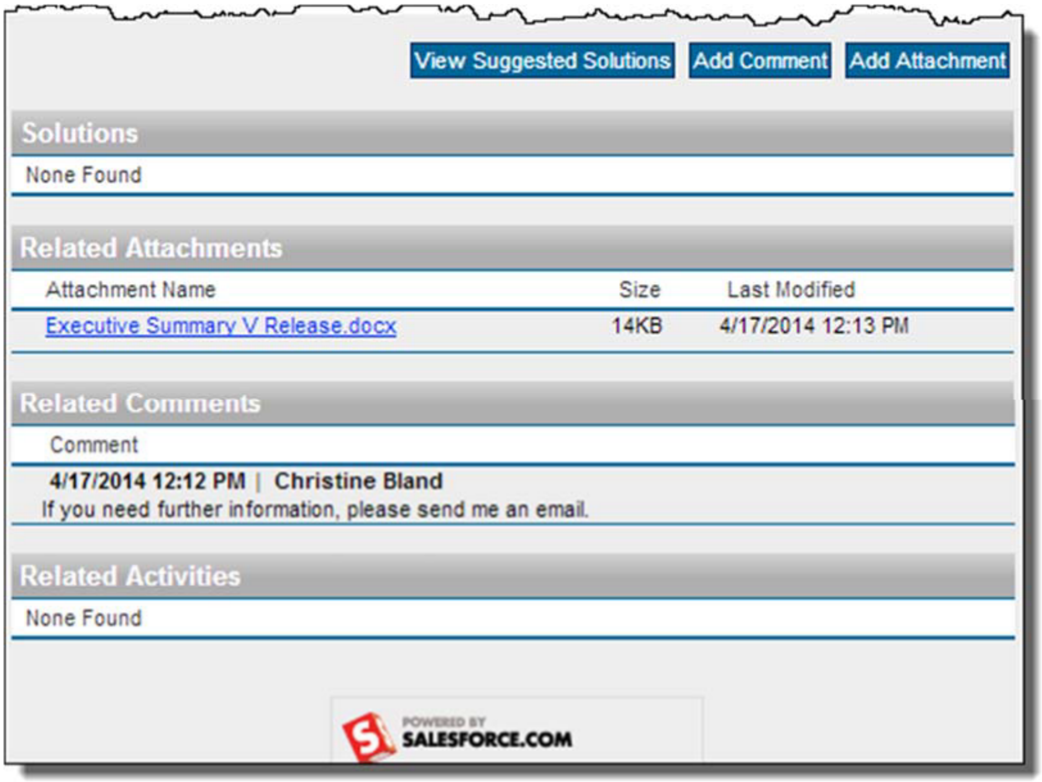
Done

You have just uploaded the following file:

File Name	Executive Summary V Release.docx
Size	14KB

POWERED BY SALESFORCE.COM

6. The Case now has a Comment and an Attachment to better clarify / provide additional information about the case.


View Suggested Solutions
Add Comment
Add Attachment

Solutions

None Found

Related Attachments

Attachment Name	Size	Last Modified
Executive Summary V Release.docx	14KB	4/17/2014 12:13 PM

Related Comments

Comment

4/17/2014 12:12 PM | Christine Bland

If you need further information, please send me an email.

Related Activities

None Found

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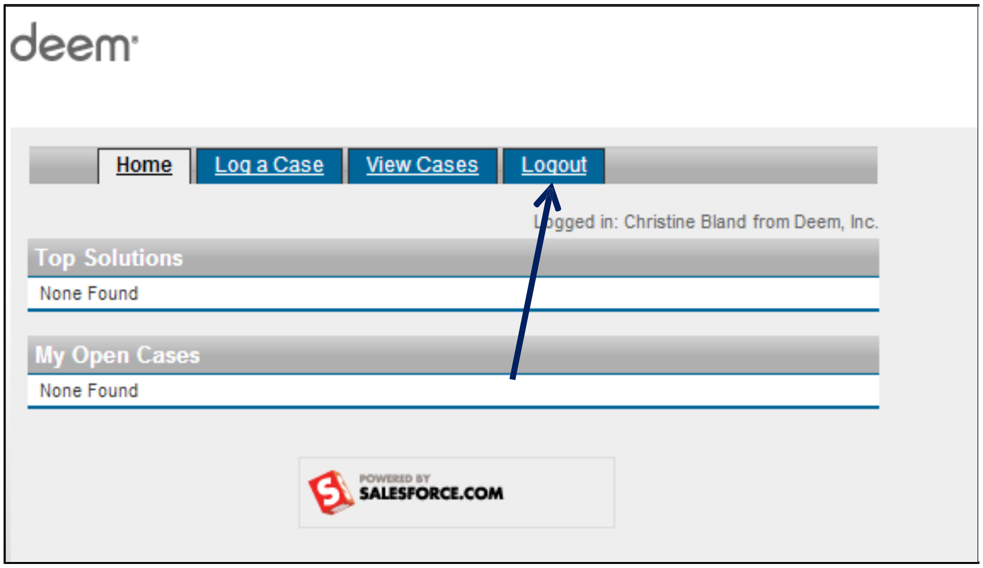
4.4 *Logging Out of the Support Portal*

To log out of the Support Portal, click the Logout tab at the top of the page. The Log In page is redisplayed.


deem
Home
Log a Case
View Cases
Logout

Logged in: Christine Bland from Deem, Inc.

Top Solutions

None Found

My Open Cases

None Found

POWERED BY SALESFORCE.COM