



# **Deem Travel: Partner Dashboard Training**

**Day 3 –**

**Travel (Part 2) Rules  
/ Groups Support  
Case Entry**

**(Version 20 January 2017)**

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# 1 Managing the Site Tabs – The Services Tab

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

## 1.1 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.

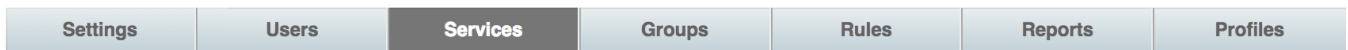
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**Note:** Custom fields are not reportable in our standard reports.

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

---

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.



### Services | Overview

#### Travel

- Travel Agency
- Vendors
- Travel Policy
- Policy Display
- Compliance Codes
- Custom Fields ←
- Alternate Airports
- Site Payment Cards
- Corporate Payment Cards
- Private Rates
- Hotel Per Diem
- Reference Points
- Restricted Countries

#### Airport Parking

- Configurations for Groups
- Policies

#### Car Service

- Configurations for Groups
- Policies

#### Expense

Additional charges apply when Expense is enabled.

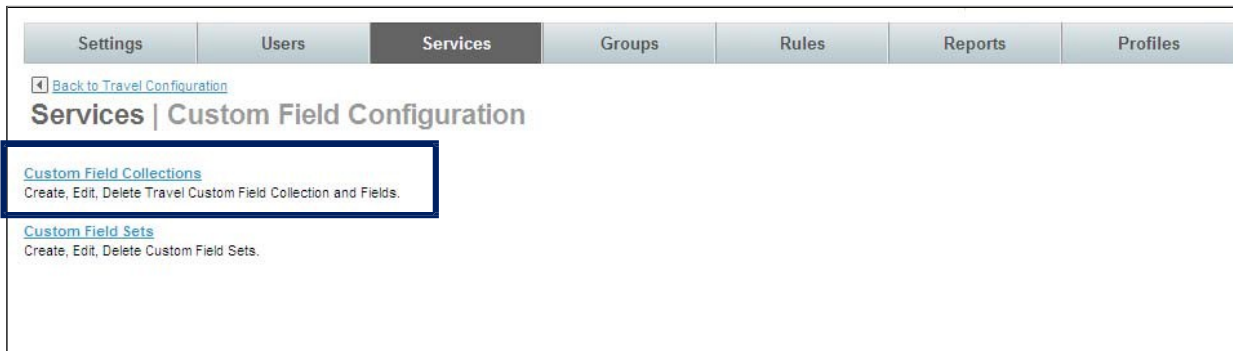
- General Settings
- Configurations for Groups
- Load Default Expense Settings
- Payer Management

#### Shipping

- General Settings
- Configurations for Groups
- Provider Accounts
- Policies



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



### 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.

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



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

**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.

**f 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.

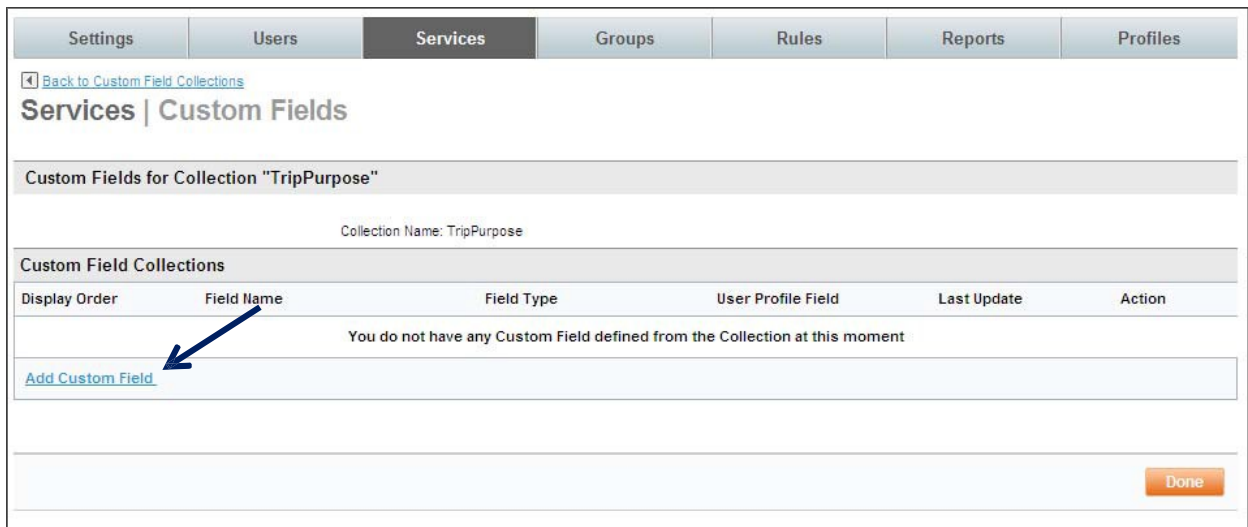
- **Display on Trip Confirmation, Trip Details and eMail Notification Pages:** By selecting this checkbox, the user will see the custom field on the Trip Confirmation, Trip Details and eMail Notification Pages.
- **Include Collection as part of “Change your trip” pages:** By selecting this checkbox, the user will see the custom field on “Change your trip” pages.
- f **Conditional Display of Collection:**
  - **JavaScript:** 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.



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



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

x **New Field** (within Collection:name):

- o **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

---

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

○ **Field Type Preference - Text**

- **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 textlines 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**

- **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\*

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

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

**Field Type Preference**

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

Date/Time

Year Range:  to

Month Range:  to

Date Range:  to

[Advanced](#)

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

- **Type:** Select *Date only*, *Time only*, or *Date and time* from the drop down list.
- **Display:** Select *Year*, *Month*, *Date*, *Hour*, *Minute*, and *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**

Type:  Number  Percentage  Currency (in USD)

Decimal Places:

**Number**

Min Value:  (Optional)

Max Value:  (Optional)

Default Value:  ⓘ (Optional)

[Advanced](#)

- **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**

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

[Advanced](#)

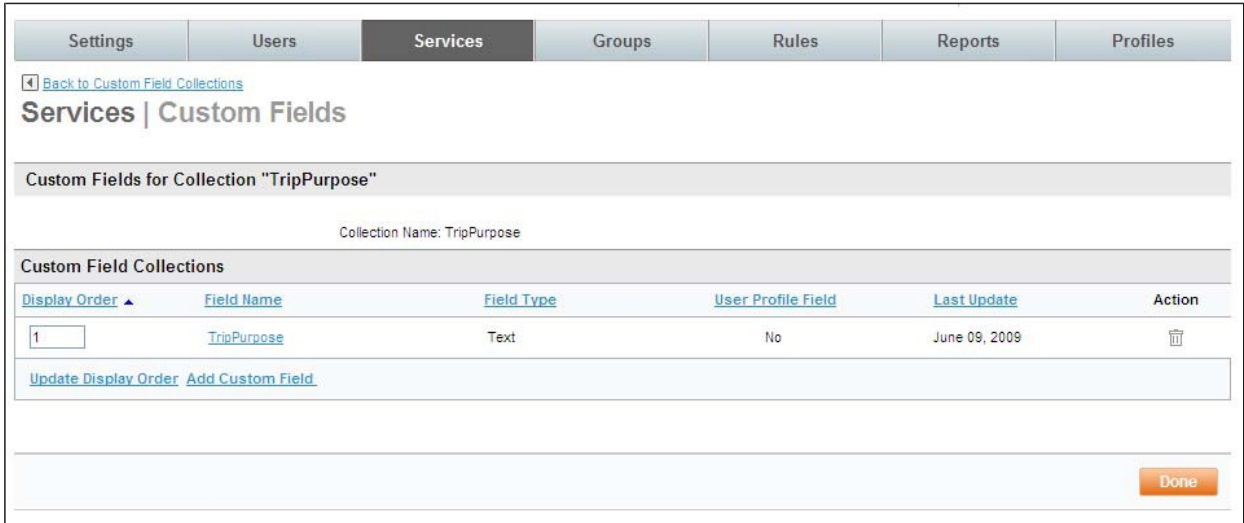
- **Display as:** Select *Select Box* or *Radio Buttons* from the drop down list.
- **Option Labels and Values:** Enter the labels which will be displayed to the user and the value that will be placed in the record separated by an equal sign. Example: "Cost Center=CC". Generally, "Select no value as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



An example of this would be the Employee Type.



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



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.

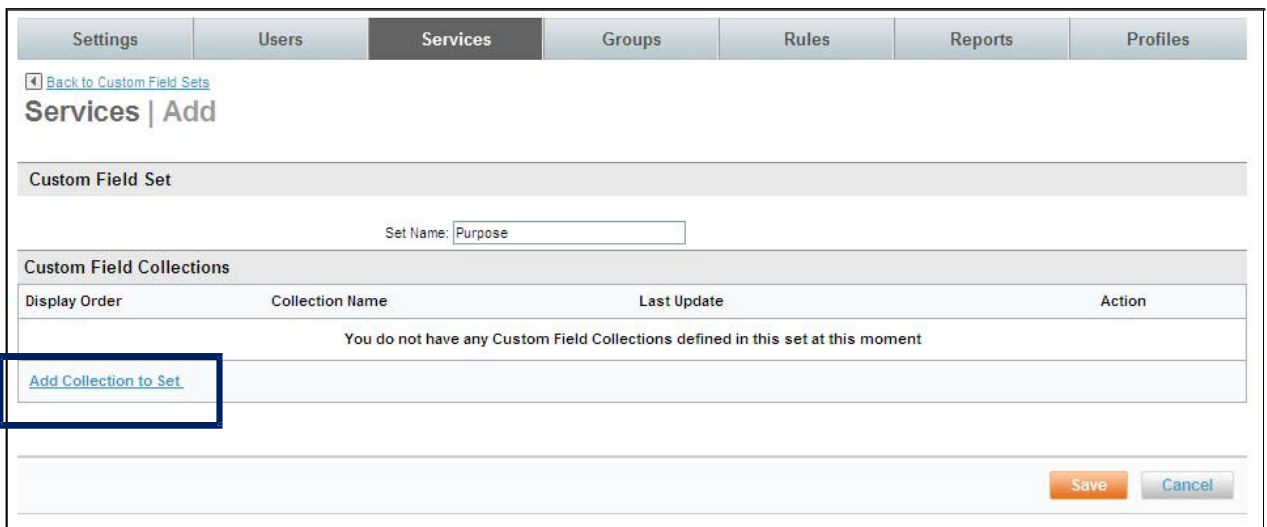




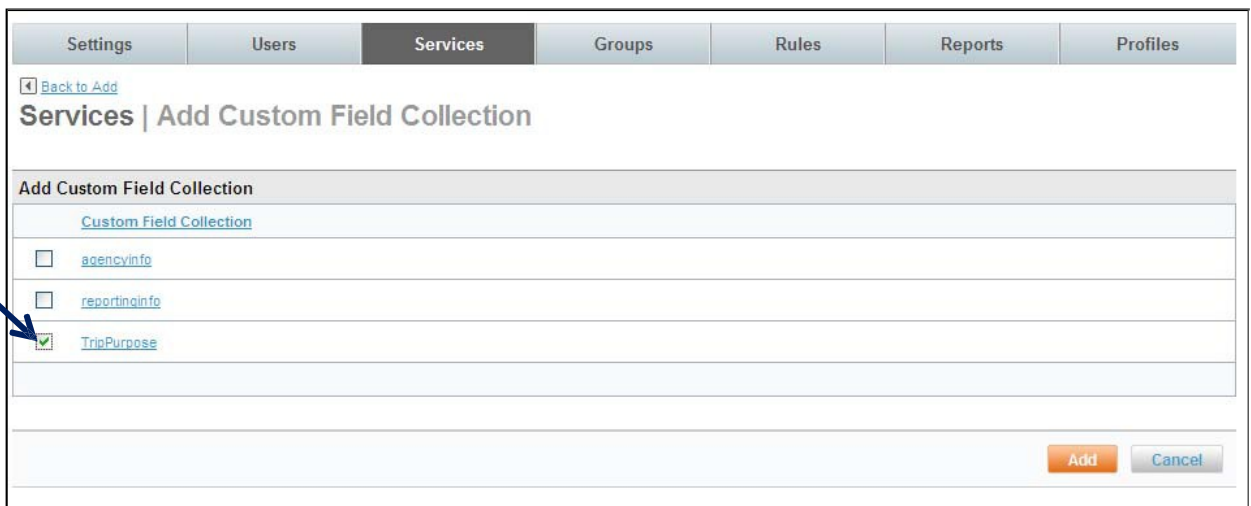
2. Click the **Custom Field Sets** link. The **Services | Custom Field Sets** page is displayed.



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



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



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.

The screenshot shows the 'Services | Add' page. At the top, there are navigation tabs: Settings, Users, Services (selected), Groups, Rules, Reports, and Profiles. Below the tabs is a breadcrumb link 'Back to Custom Field Sets' and the page title 'Services | Add'. The main content area is titled 'Custom Field Set' and contains a 'Set Name' input field with the value 'Purpose'. Below this is a table titled 'Custom Field Collections' with the following data:

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

Below the table are links for 'Update Display Order' and 'Add Collection to Set'. At the bottom right, there are 'Save' and 'Cancel' buttons. A blue arrow points to the 'Save' button.

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.

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**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.

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### 1.2.1 Vendor Management List Items

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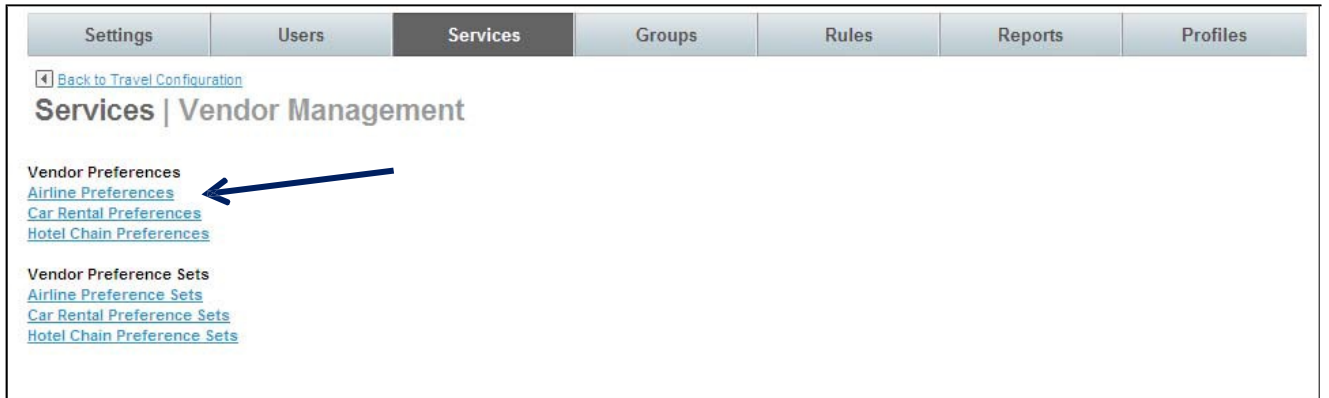
**Note:** The *Vendor Management Preferences* adhere to the List and Set structure

---

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.



- 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
<a href="#">KF AIR</a>	MEM	ORD	ANYWHERE	NW		Yes	<a href="#">Copy</a> <a href="#">✕</a>
<a href="#">Sacramento</a>	smf,sfo,oak,sjc,rno	ANYWHERE	ANYWHERE	AA	NW,CO,US	No	<a href="#">Copy</a> <a href="#">✕</a>

[Add A New Airline Preference](#)

- 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.

- **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:

Highly Preferred Airlines:

Preferred Airlines:

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:

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

○ **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.



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.





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

f **Car Rental Preferences:**

o **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.

o **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

[Airport Code](#)

- 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.

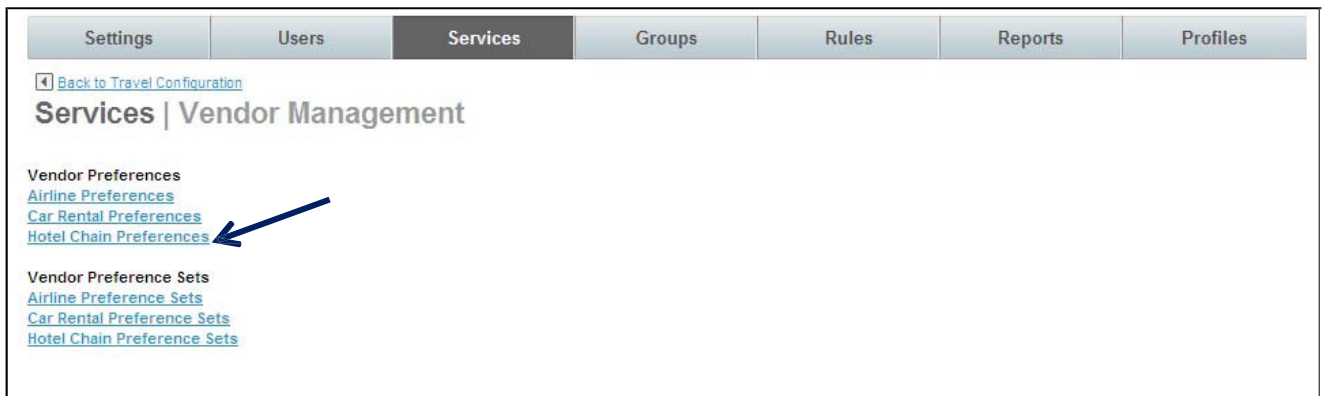
---

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

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### 1.2.1.3 Hotel Chain Preferences

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



- 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.

Services | Hotel Chain Preferences

Name	Location	Preferred	Restricted	End Date
<a href="#">ABC Hotels</a>	Los Angeles, CA, US; New York, NY, US; San Francisco, CA, US	HY, HH, MC	KI, SI	<a href="#">Copy</a>
<a href="#">Sacramental Hotels</a>	Sacramento, CA, US	RD, HY, SI	LQ, RC, GI	<a href="#">Copy</a>
<a href="#">Foster City Hotels</a>	Foster City, CA, US	CP, MC, HH	HI	<a href="#">Copy</a>
<a href="#">Add A New Hotel Chain Preference</a>				

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

Services | Add

**General Settings**

Name:

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:

Highly Preferred Hotel Chain:

Preferred Hotel Chain:

Flag the Preferred Hotels as Preferred?:  Yes  No

**Restricted Hotel Chains**

Hotel chains to be excluded:

Hotel chains to be displayed last:

Hotel chains to be displayed after similar hotels:

Remove logo of restricted hotels:  Yes  No

Remove pictures and video of restricted hotels:  Yes  No

f **Hotel Chain Preferences:**

o **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.
- o **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.*

The screenshot shows a form titled "Location Preferences". At the top, there are two radio buttons: "Apply globally (regardless of location)" which is unselected, and "Apply to specific locations (set locations below)" which is selected. Below this, there is a text instruction: "Separate multiple place names with semicolons." Underneath, there is a "Location:" label followed by four radio buttons: "by place names" (selected), "by states", "by countries", and "Anywhere". Below these radio buttons is an empty text input field.

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

This screenshot shows the same "Location Preferences" form, but with different selections. The "Apply to specific locations (set locations below)" radio button remains selected. The "by states" radio button is now selected, while "by place names" is unselected. Below the "Location:" label, a dropdown menu is open, displaying a list of US states: Alaska, Alabama, Arkansas, Arizona, and California. The dropdown has blue arrows at the top and bottom.

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

- 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.

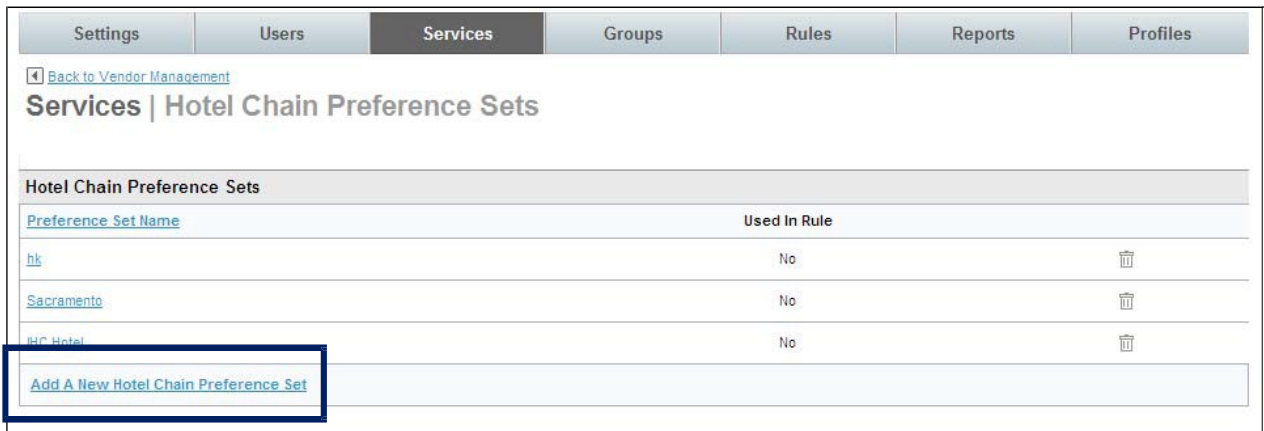
- **Restricted Hotel Chains:**

- **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.

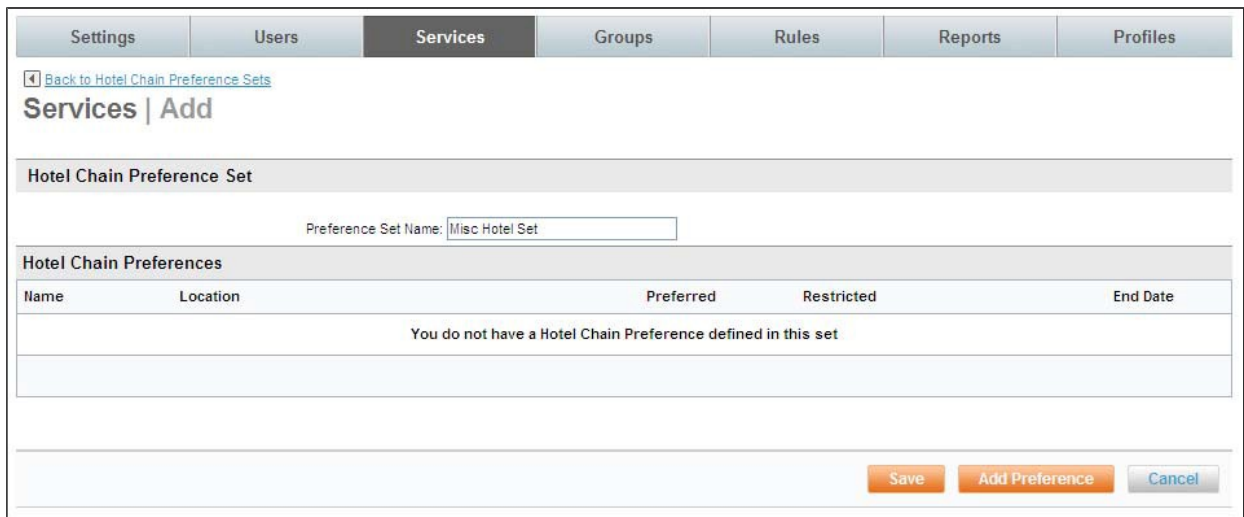
4. Click the **Save** to save the preferences. Click the **Back to Vendor Management** link to return to the **Vendor Management** page.

### 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.



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



- f **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*.



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

Select One	Name	Location	Preferred	Restricted	End Date
<input checked="" type="radio"/>	<a href="#">ABC Hotels</a>	Los Angeles, CA, US; New York, NY, US; San Francisco, CA, US	HY, HH, MC	SI, KI	
<input type="radio"/>	<a href="#">Sacramento Hotels</a>	Sacramento, CA, US	RD, HY, SI	GI	
<input type="radio"/>	<a href="#">Foster City Hotels</a>	Foster City, CA, US	CP, MC, HH	HI	

- 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.
- Click the “\_ **changes not applied**” link to review the changes.
- 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

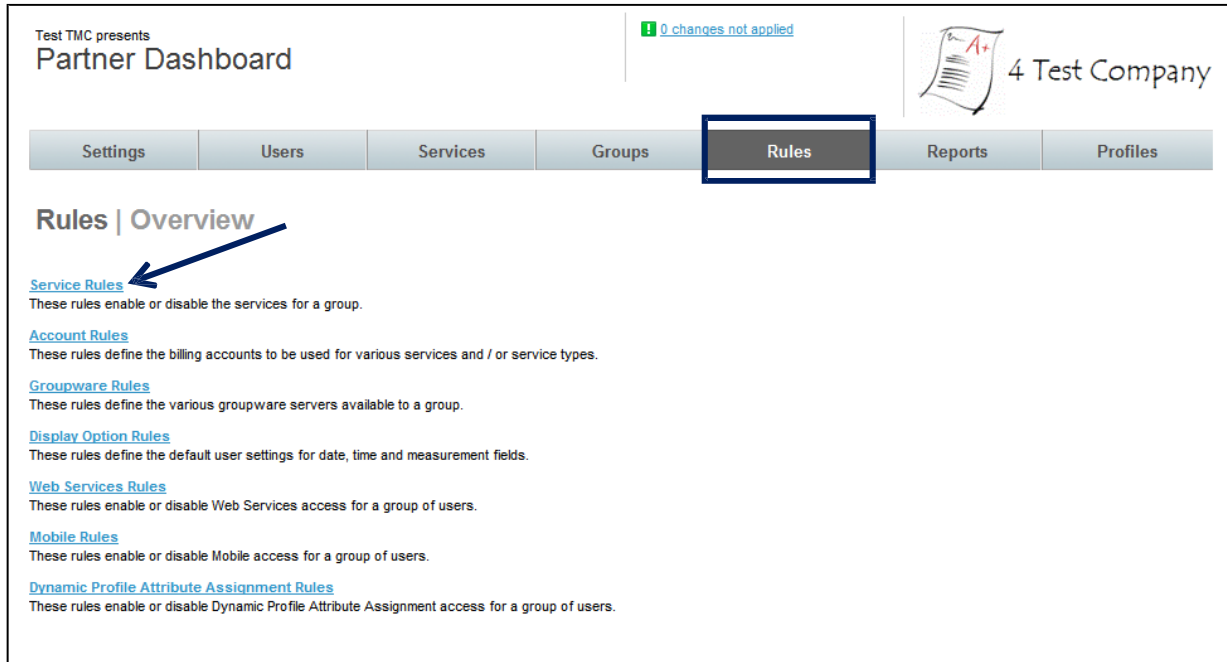
The Deem Dashboard Service Rules Tab is where to establish the rules engaged when a user is viewing and booking Travel (Air, Car and Hotel) and other services such as Conferencing, Shipping, and Dining.

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** *AE* **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.



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.

Settings	Users	Services	Groups	Rules	Reports	Profiles			
<a href="#">Back to Overview</a> <b>Rules   Service Rules</b> <span style="color: yellow;">■</span> = Inactive Rules <span style="color: green;">■</span> = Active Rules									
Priority	Group	Dining	Conferencing	Corporate Admin Portal	Shipping	Expenses (New)	Expensewire (Discontinued)	Travel	Shopping
	Everyone	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>
							<input type="button" value="Save Priority Changes"/> <input type="button" value="Cancel"/>		

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:

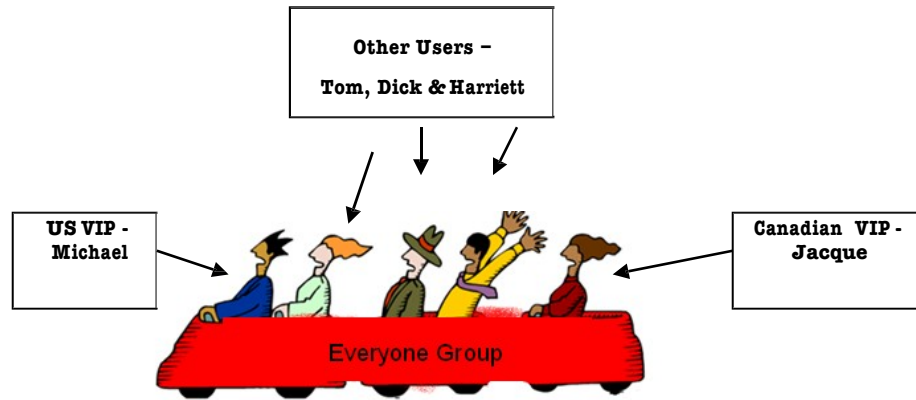
- x **Add** link indicates there are currently no rules established for the group for the specific service
- x **Edit** link with GREEN coloration indicates there are rules established for the group for the specific service and they are active
- x **Edit** link with YELLOW coloration indicates there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



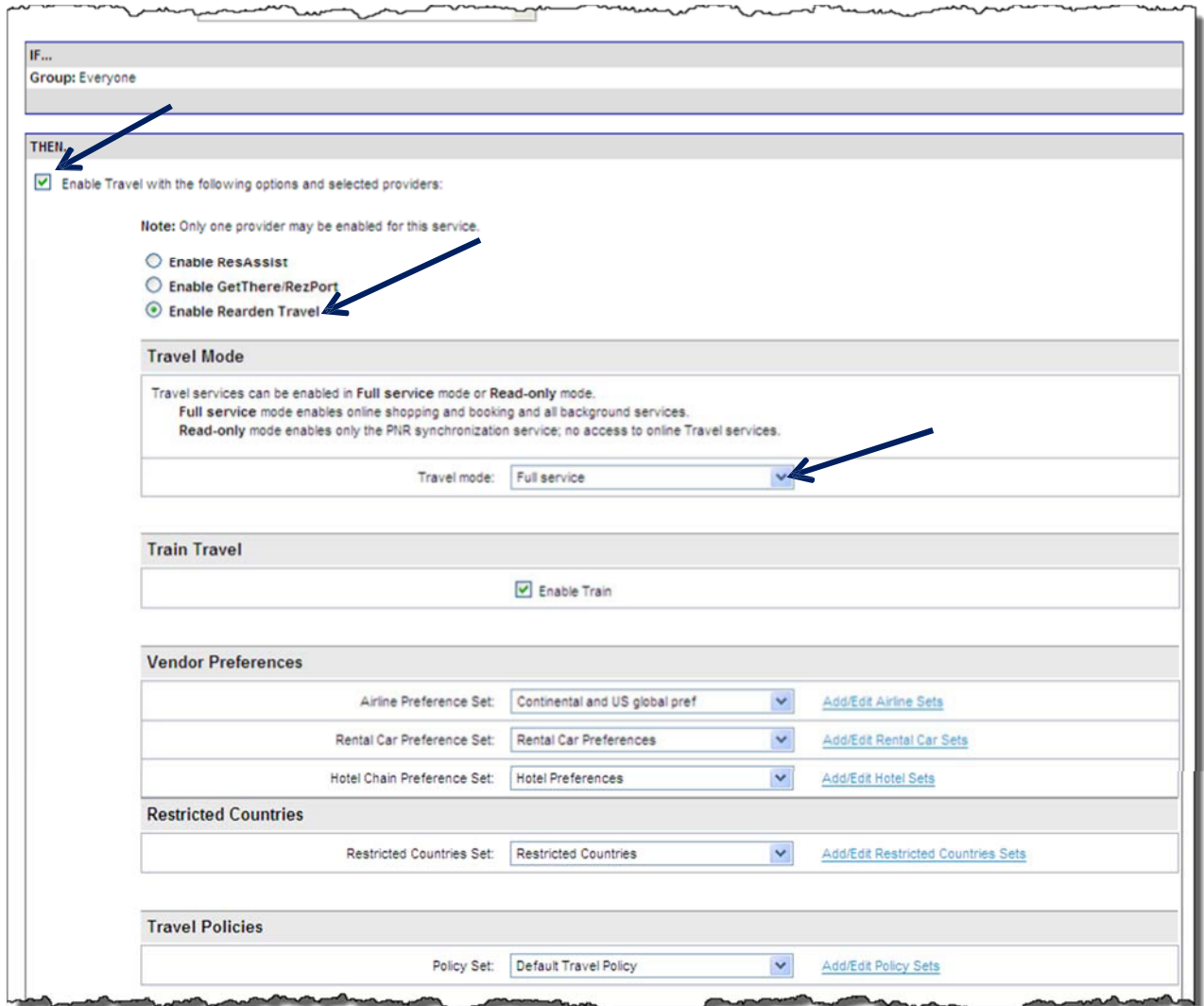
If different users will follow different travel rules, VIP's for example, add other groups to define each unique set of users and then add Travel Service Rules to the appropriate group. We will discuss adding additional groups and establishing their rules later in this guide.

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
<a href="#">Back to Service Rules</a>						
<h2>Rules   Travel Rule</h2>						
<b>Rule Definition</b>						
Description:		<input type="text" value="Everyone Rule"/>			<input checked="" type="checkbox"/> Activate Rule	
<b>IF...</b>						
Group: Everyone						

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



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:**

- o Select **Full service** from the drop down list if the rule is to include the travel store
- o 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**

- o 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.

- o **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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Airline Preference Sets</h2>						
<h3>Airline Preference Sets</h3>						
<u>Preference Set Name</u>		Used In Rule				
<a href="#">Sacramento</a>		No				
<a href="#">AI AIR SET</a>		No				
<a href="#">AFD Property Mgt</a>		Yes				
<a href="#">Add A New Airline Preference Set</a>						

- 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Car Rental Preference Sets</h2>						
<h3>Car Rental Preference Sets</h3>						
<u>Preference Set Name</u>		Used In Association				
<a href="#">AI CAR SET</a>		No				
<a href="#">CARIE'S SET</a>		Yes				
<a href="#">Add A New Car Rental Preference Set</a>						

- 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.

Settings	Users	Services	Groups	Rules	Reports	Profiles																		
<a href="#">Back to Travel Rule</a>																								
<h3>Rules   Hotel Chain Preference Sets</h3>																								
<table border="1"> <thead> <tr> <th colspan="3">Hotel Chain Preference Sets</th> </tr> <tr> <th>Preference Set Name</th> <th>Used In Association</th> <th></th> </tr> </thead> <tbody> <tr> <td><a href="#">hk</a></td> <td>Yes</td> <td></td> </tr> <tr> <td><a href="#">Sacramento</a></td> <td>No</td> <td></td> </tr> <tr> <td><a href="#">IHC Hotel</a></td> <td>No</td> <td></td> </tr> <tr> <td colspan="3"> <a href="#">Add A New Hotel Chain Preference Set</a> </td> </tr> </tbody> </table>							Hotel Chain Preference Sets			Preference Set Name	Used In Association		<a href="#">hk</a>	Yes		<a href="#">Sacramento</a>	No		<a href="#">IHC Hotel</a>	No		<a href="#">Add A New Hotel Chain Preference Set</a>		
Hotel Chain Preference Sets																								
Preference Set Name	Used In Association																							
<a href="#">hk</a>	Yes																							
<a href="#">Sacramento</a>	No																							
<a href="#">IHC Hotel</a>	No																							
<a href="#">Add A New Hotel Chain Preference Set</a>																								

- 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.
- x **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.

Settings	Users	Services	Groups	Rules	Reports	Profiles												
<a href="#">Back to Travel Rule</a>																		
<h3>Rules   Restricted Countries Configuration Sets</h3>																		
<table border="1"> <thead> <tr> <th colspan="3">Restricted Countries Configuration Sets</th> </tr> <tr> <th>Set Name</th> <th>Used In Rule</th> <th>Last Update</th> </tr> </thead> <tbody> <tr> <td colspan="3" style="text-align: center;">                     You do not have any Restricted Countries Configuration Sets defined                 </td> </tr> <tr> <td colspan="3"> <a href="#">Add Restricted Countries Configuration Set</a> </td> </tr> </tbody> </table>							Restricted Countries Configuration Sets			Set Name	Used In Rule	Last Update	You do not have any Restricted Countries Configuration Sets defined			<a href="#">Add Restricted Countries Configuration Set</a>		
Restricted Countries Configuration Sets																		
Set Name	Used In Rule	Last Update																
You do not have any Restricted Countries Configuration Sets defined																		
<a href="#">Add Restricted Countries Configuration Set</a>																		




- Select the **Restricted Countries Configuration Sets Name** link to review the set or click **Add Restricted Countries Configuration Set** to add a new set.
- x **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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Policy Sets</h2>						
<b>Policy Sets</b>						
<a href="#">Set Name</a> ▼		Used In Rule	<a href="#">Last Update</a>			
<a href="#">Guest Travel</a>		No	August 16, 2007			
<a href="#">Everyone</a>		No	August 16, 2007			
<a href="#">Sacramento</a>		No	August 21, 2007			
<a href="#">Add A New Travel Policy Set</a>						

- 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)

The screenshot displays a configuration page with several sections, each containing a dropdown menu and a link to 'Add/Edit' settings:

- Compliance Codes**
  - Air Codes Set: Airline Compliance Codes (dropdown) | [Add/Edit Air Codes Sets](#)
  - Train Codes Set: Dummy Train (dropdown) | [Add/Edit Train Codes Sets](#)
  - Hotel Codes Set: Hotel Compliance Codes (dropdown) | [Add/Edit Hotel Codes Sets](#)
  - Car Rental Codes Set: Car Rental Compliance Codes (dropdown) | [Add/Edit Car Rental Codes Sets](#)
  - Payment Card Codes Set: dummy CC set (dropdown) | [Add/Edit Payment Card Codes Sets](#)
- Agency Configuration**
  - Agency Configuration Set: Chris Blands Test Group - Sabre (dropdown) | [Add/Edit Agency Config Sets](#)
- Alternate Airports**
  - Alternate Airport Set: None (dropdown) | [Add/Edit Airport Sets](#)
- Display Configurations**
  - Configuration: DefaultDisplaySettings (dropdown) | [Add/Edit Configurations](#)
- Corporate Payment Card Restrictions**
  - Payment Card Set: None (dropdown) | [Add/Edit Payment Card Sets](#)
- Corporate Site Payment Cards**
  - Site Payment Card Set: None (dropdown) | [Add/Edit Site Payment Card Sets](#)
- Hotel Per Diems**
  - Hotel Per Diem Set: None (dropdown) | [Add/Edit Hotel per Diems](#)

x **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.

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Compliance Codes Sets</h2>						
<h3>Compliance Codes Sets</h3>						
Set Name	Type	Used In Rule	Last Update			
<a href="#">Air Compliance Codes</a>	Airline	Yes	October 25, 2010			
<a href="#">Airline Compliance Codes</a>	Airline	Yes	September 22, 2010			
<a href="#">Car Rental Compliance Codes</a>	Car Rental	Yes	April 21, 2008			
<a href="#">Charge Card Compliance Codes</a>	Payment Card	Yes	April 21, 2008			
<a href="#">Dummy Train</a>	Train	Yes	June 22, 2009			
<a href="#">Hotel Compliance Codes</a>	Hotel	Yes	April 21, 2008			
<a href="#">dummy CC set</a>	Payment Card	Yes	October 28, 2008			
<a href="#">Add A New Compliance Code Set</a>						

- 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.

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Travel Rule</a> <b>Rules   Agency Settings</b>						
<b>Agency Settings</b>						
<a href="#">Setting Name</a> ▾	GDS	PCC	Location	Used In Rule		
<a href="#">Agency Configuration</a>	Sabre	1234	SFO	No		
<a href="#">Add A New Agency Setting</a>						

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

**x Alternate Airports:**

---

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

---

- o **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.

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Travel Rule</a> <b>Rules   Alternate Airport Sets</b>						
<b>Alternate Airport Sets</b>						
<a href="#">Set Name</a> ▾	Used In Rule	<a href="#">Last Update</a>				
<a href="#">Charlotte Based</a>	Yes	May 15, 2009				
<a href="#">Sacramento</a>	Yes	March 03, 2008				
<a href="#">TPA BOS</a>	No	March 03, 2008				
<a href="#">VA</a>	Yes	March 03, 2008				
<a href="#">Add A New Alternate Airport Code Set</a>						

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

**x Display Configuration:**

---

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

---

- o **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.

Settings	Users	Services	Groups	Rules	Reports	Profiles																				
<a href="#">Back to Travel Rule</a>																										
<h2>Rules   Display Configuration Sets</h2>																										
<table border="1"> <thead> <tr> <th colspan="4">Display Configuration Sets</th> </tr> <tr> <th>Set Name</th> <th>Used In Rule</th> <th>Last Update</th> <th></th> </tr> </thead> <tbody> <tr> <td><a href="#">Guest Travel</a></td> <td>No</td> <td>August 22, 2007</td> <td></td> </tr> <tr> <td><a href="#">Everyone</a></td> <td>No</td> <td>August 21, 2007</td> <td></td> </tr> <tr> <td colspan="4"> <a href="#">Add A New Display Configuration Set</a> </td> </tr> </tbody> </table>							Display Configuration Sets				Set Name	Used In Rule	Last Update		<a href="#">Guest Travel</a>	No	August 22, 2007		<a href="#">Everyone</a>	No	August 21, 2007		<a href="#">Add A New Display Configuration Set</a>			
Display Configuration Sets																										
Set Name	Used In Rule	Last Update																								
<a href="#">Guest Travel</a>	No	August 22, 2007																								
<a href="#">Everyone</a>	No	August 21, 2007																								
<a href="#">Add A New Display Configuration Set</a>																										

- 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.

- o **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.

Settings	Users	Services	Groups	Rules	Reports	Profiles																
<a href="#">Back to Travel Rule</a>																						
<h2>Rules   Corporate Payment Card Sets</h2>																						
<table border="1"> <thead> <tr> <th colspan="4">Corporate Payment Card Sets</th> </tr> <tr> <th>Set Name</th> <th>Used In Rule</th> <th>Last Update</th> <th></th> </tr> </thead> <tbody> <tr> <td><a href="#">XYZ hotel GTD</a></td> <td>No</td> <td>August 21, 2007</td> <td></td> </tr> <tr> <td colspan="4"> <a href="#">Add a new payment card set</a> </td> </tr> </tbody> </table>							Corporate Payment Card Sets				Set Name	Used In Rule	Last Update		<a href="#">XYZ hotel GTD</a>	No	August 21, 2007		<a href="#">Add a new payment card set</a>			
Corporate Payment Card Sets																						
Set Name	Used In Rule	Last Update																				
<a href="#">XYZ hotel GTD</a>	No	August 21, 2007																				
<a href="#">Add a new payment card set</a>																						

- 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.

- o **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								
<a href="#">Back to Travel Rule</a>														
<h2>Rules   Site Payment Cards Sets</h2>														
<p>Site Payment Cards Sets</p> <table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> <th>Last Update</th> <th></th> </tr> </thead> <tbody> <tr> <td><a href="#">Corp American Express Card</a></td> <td>No</td> <td>October 25, 2010</td> <td></td> </tr> </tbody> </table> <p><a href="#">Add a new site payment card set</a></p>							Set Name	Used In Rule	Last Update		<a href="#">Corp American Express Card</a>	No	October 25, 2010	
Set Name	Used In Rule	Last Update												
<a href="#">Corp American Express Card</a>	No	October 25, 2010												

- 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.

- o **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								
<a href="#">Back to Travel Rule</a>														
<h2>Rules   Hotel Per Diem Sets</h2>														
<p>Hotel Per Diem Sets</p> <table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> <th>Last Update</th> <th></th> </tr> </thead> <tbody> <tr> <td><a href="#">MCO</a></td> <td>No</td> <td>May 15, 2009</td> <td></td> </tr> </tbody> </table> <p><a href="#">Add A New Hotel Per Diem Set</a></p>							Set Name	Used In Rule	Last Update		<a href="#">MCO</a>	No	May 15, 2009	
Set Name	Used In Rule	Last Update												
<a href="#">MCO</a>	No	May 15, 2009												

- 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 [Add/Edit Reference Points Sets](#)

---

**Private Negotiated Rate Sets**

Airline Rate Set: Airline Rate Set [Add/Edit Airline Rate Sets](#)

Train Private Rate Set: Train Set [Add/Edit Train Rate Sets](#)

Rental Car/Hotel Discount Code Set: Car and Hotel Rates [Add/Edit Rental Car/Hotel Discount Code Sets](#)

Hotel Private Rate Set: None [Add/Edit Hotel Private Rate Sets](#)

---

**Company Information**

Company: Acme Corp [Add/Edit Company Info](#)

---

**Custom Fields**

Custom Field Set: DefaultCustomSet [Add/Edit Custom Fields Set](#)

---

Enable Airport Parking with the following options:

Configuration:	<span style="border: 1px solid #ccc; padding: 2px;">ABC CO.everyone</span>	<a href="#">Manage Configurations</a>
Site Payment Card Set:	<span style="border: 1px solid #ccc; padding: 2px;">None</span>	<a href="#">Manage Site Payment Card Sets</a>
Policies:	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<a href="#">Add Policies to List</a> <a href="#">Remove Selected Policies from List</a> <a href="#">Manage All Policies</a>

Enable Car Service with the following options:

Configuration:	<span style="border: 1px solid #ccc; padding: 2px;">Deem Network</span>	<a href="#">Manage Configurations</a>
Reference Points Set:	<span style="border: 1px solid #ccc; padding: 2px;">None</span>	<a href="#">Manage Reference Points Sets</a>
Payment Card Set:	<span style="border: 1px solid #ccc; padding: 2px;">None</span>	<a href="#">Manage Payment Card Sets</a>
Site Payment Card Set:	<span style="border: 1px solid #ccc; padding: 2px;">None</span>	<a href="#">Manage Site Payment Card Sets</a>
Policies:	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>	<a href="#">Add Policies to List</a> <a href="#">Remove Selected Policies from List</a> <a href="#">Manage All Policies</a>

Save
Cancel

**X 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									
<a href="#">Back to Travel Rule</a>															
<h2>Rules   Reference Point Sets</h2>															
<table border="1"> <thead> <tr> <th>Reference Point Sets</th> </tr> <tr> <th>Set Name</th> <th>Used In Rule</th> </tr> </thead> <tbody> <tr> <td> <a href="#">Reference Points</a> </td> <td>Yes</td> <td style="text-align: right;"></td> </tr> <tr> <td colspan="3"> <a href="#">Add A New Reference Point Set</a> </td> </tr> </tbody> </table>							Reference Point Sets	Set Name	Used In Rule	<a href="#">Reference Points</a>	Yes		<a href="#">Add A New Reference Point Set</a>		
Reference Point Sets															
Set Name	Used In Rule														
<a href="#">Reference Points</a>	Yes														
<a href="#">Add A New Reference Point Set</a>															

- 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.

- o **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								
<a href="#">Back to Travel Rule</a>														
<h2>Rules   Airline Rate Sets</h2>														
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> </tr> </thead> <tbody> <tr> <td> <a href="#">A20</a> </td> <td>No</td> <td style="text-align: right;"></td> </tr> <tr> <td colspan="3"> <a href="#">Add A New Airline Rate</a> </td> </tr> </tbody> </table>							Set Name	Used In Rule	<a href="#">A20</a>	No		<a href="#">Add A New Airline Rate</a>		
Set Name	Used In Rule													
<a href="#">A20</a>	No													
<a href="#">Add A New Airline Rate</a>														

- Select the **Set Name** link to review the set or click **Add A New Airline Rate** to add a new set.
- o **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								
<a href="#">Back to Travel Rule</a>														
<h2>Rules   Train Rates Sets</h2>														
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> </tr> </thead> <tbody> <tr> <td> <a href="#">Northeast Corridor</a> </td> <td>No</td> <td style="text-align: right;"></td> </tr> <tr> <td colspan="3"> <a href="#">Add A New Train Private Rate Set</a> </td> </tr> </tbody> </table>							Set Name	Used In Rule	<a href="#">Northeast Corridor</a>	No		<a href="#">Add A New Train Private Rate Set</a>		
Set Name	Used In Rule													
<a href="#">Northeast Corridor</a>	No													
<a href="#">Add A New Train Private Rate Set</a>														

- 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.

Settings	Users	Services	Groups	Rules	Reports	Profiles																																					
<a href="#">Back to Travel Rule</a>																																											
<h3>Rules   Rental Car/Hotel Discount Code Sets</h3>																																											
<table border="1"> <thead> <tr> <th colspan="7">Rental Car/Hotel Discount Code Sets</th> </tr> <tr> <th>Set Name</th> <th colspan="6">Used In Rule</th> </tr> </thead> <tbody> <tr> <td><a href="#">kf car/HOTEL set</a></td> <td>No</td> <td colspan="5"></td> <td></td> </tr> <tr> <td><a href="#">MC set</a></td> <td>No</td> <td colspan="5"></td> <td></td> </tr> <tr> <td colspan="7"> <a href="#">Add A New Rental Car Discount Code Set</a> </td> </tr> </tbody> </table>							Rental Car/Hotel Discount Code Sets							Set Name	Used In Rule						<a href="#">kf car/HOTEL set</a>	No							<a href="#">MC set</a>	No							<a href="#">Add A New Rental Car Discount Code Set</a>						
Rental Car/Hotel Discount Code Sets																																											
Set Name	Used In Rule																																										
<a href="#">kf car/HOTEL set</a>	No																																										
<a href="#">MC set</a>	No																																										
<a href="#">Add A New Rental Car Discount Code Set</a>																																											

- 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.

Settings	Users	Services	Groups	Rules	Reports	Profiles																												
<a href="#">Back to Travel Rule</a>																																		
<h3>Rules   Hotel Private Rate Sets</h3>																																		
<table border="1"> <thead> <tr> <th colspan="7">Hotel Private Rate Sets</th> </tr> <tr> <th>Set Name</th> <th colspan="6">Used In Rule</th> </tr> </thead> <tbody> <tr> <td colspan="7" style="text-align: center;">You do not have Sets for Negotiated Rates at this moment</td> </tr> <tr> <td colspan="7"> <a href="#">Add A New Hotel Private Rate Set</a> </td> </tr> </tbody> </table>							Hotel Private Rate Sets							Set Name	Used In Rule						You do not have Sets for Negotiated Rates at this moment							<a href="#">Add A New Hotel Private Rate Set</a>						
Hotel Private Rate Sets																																		
Set Name	Used In Rule																																	
You do not have Sets for Negotiated Rates at this moment																																		
<a href="#">Add A New Hotel Private Rate Set</a>																																		

- 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.

**X 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Company Information</h2>						
<b>Companies</b>						
<u>Name</u> ▾		Used in Rule				
<a href="#">Acme Corp</a>		No				
<a href="#">Add A New Company</a>						

- 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Custom Field Sets</h2>						
<b>Custom Field Sets</b>						
<u>Set Name</u>		Used In Rule		<u>Last Update</u>		Action
<a href="#">Trip Reason</a>		No		August 21, 2007		
<a href="#">Add A New Custom Field Set</a>						

- 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Configurations</h2>						
<b>Configurations</b>						
Name ▾		Description			Used in Rule	
<a href="#">Car Service</a>					No 	
<a href="#">Add A New Configuration</a>						

- 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Reference Point Sets</h2>						
<b>Reference Point Sets</b>						
Set Name		Used In Rule				
<a href="#">Reference Points</a>		Yes				
<a href="#">Add A New Reference Point Set</a>						

- 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Corporate Payment Card Sets</h2>						
<b>Corporate Payment Card Sets</b>						
Set Name ▾		Used In Rule		Last Update		
<a href="#">XYZ hotel GTD</a>		No		August 21, 2007 		
<a href="#">Add a new payment card set</a>						

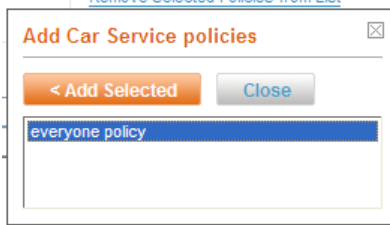
- Select the **Corporate Payment Cards Set Name** link to review the set or click **Add A New Payment Card Set** to add a new set.
- **Site Payment Card Set:** Select the Site Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set,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



- 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.



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



- 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.

- o **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
<a href="#">Back to Travel Rule</a>						
<b>Rules   Configurations</b>						
<b>Configurations</b>						
<a href="#">Name</a> ▾	<a href="#">Description</a>				<a href="#">Used in Rule</a>	
<a href="#">ABC CO .pdf</a>					No	
<a href="#">Add A New Configuration</a>						

- Select the **Configurations Name** link to review the set or click **New Configuration** to add a new configuration.
- o **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
<a href="#">Back to Travel Rule</a>						
<b>Rules   Site Payment Cards Sets</b>						
<b>Site Payment Cards Sets</b>						
<a href="#">Set Name</a> ▾				<a href="#">Used In Rule</a>	<a href="#">Last Update</a>	
<a href="#">Corp American Express Card</a>				No	October 25, 2010	
<a href="#">Add a new site payment card set</a>						

- 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.
- o **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.



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.

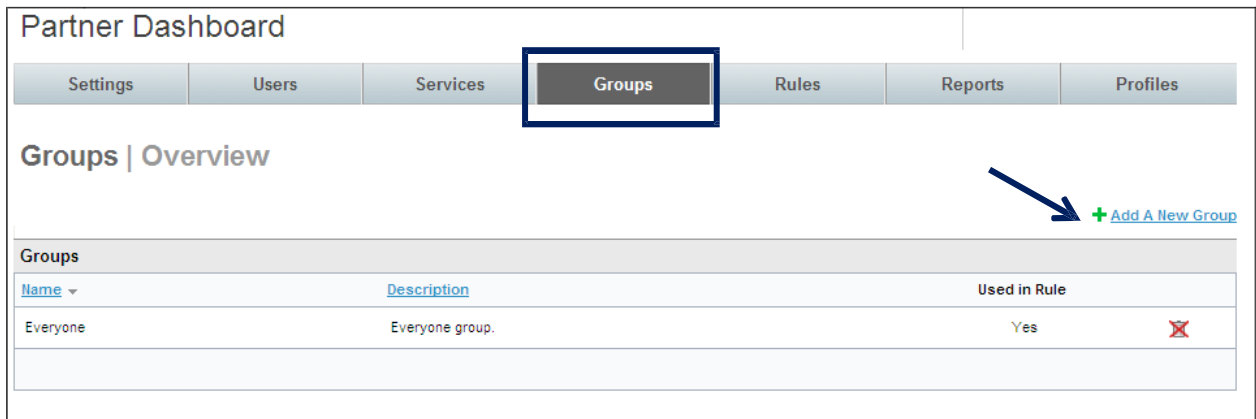
### 2.2.1 TravelService Rules for Other Groups of Users

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.



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

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.

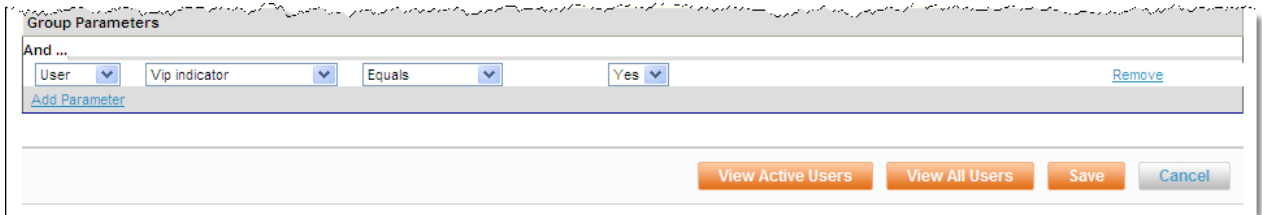
- **Description:** Enter an optional group description.
- **Group Use:** Select the Rules where this group will be used.
  - **Service Rules:** Select this checkbox if the group will be displayed in the list of groups for Service Rules. (We have checked this box for the US VIP Group)
  - **Account Rules:** 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.

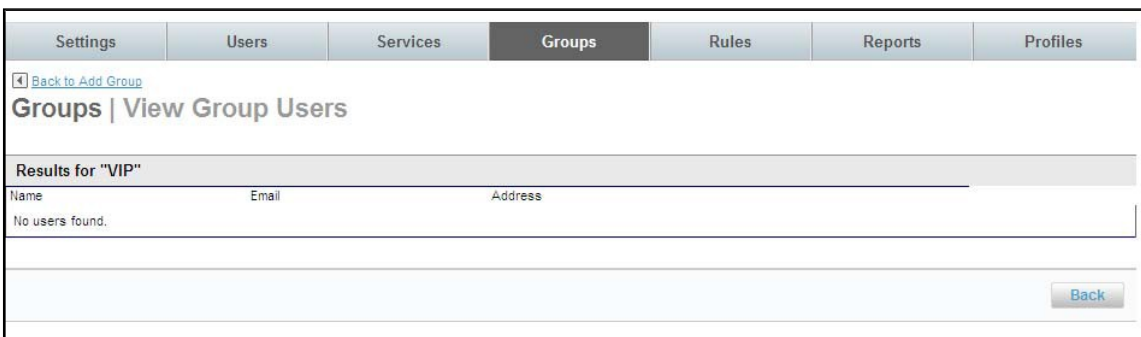
- 4. Click the **View Active Users** button to be sure the value used as the parameter is correct.



- 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.



**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.



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





- 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.

The screenshot shows the 'Groups | Add Group' page. At the top, there are navigation tabs: Settings, Users, Services, Groups (selected), Rules, Reports, and Profiles. Below the tabs is a 'Back to Overview' link. The main heading is 'Groups | Add Group'. Underneath is a 'Group Definition' section. It includes a 'Group Name' field with 'VIP Canada' and a 'Description' field with 'Canada VIPs'. There are several checkboxes for 'Group Use': 'Service Rules' (checked), 'Account Rules' (unchecked), 'Groupware Rules' (unchecked), 'Display Option Rules' (checked), 'Web Services Rules' (unchecked), 'Mobile Rules' (unchecked), and 'Dynamic Profile Attribute Assignment Rules' (unchecked). Below this is the 'Group Parameters' section, which has two rows of rules. The first row is 'User Vip indicator Equals Yes' with a 'Remove' link. The second row is 'User Country Code Equals CA' with a 'Remove' link. At the bottom of the form are buttons for 'View Active Users', 'View All Users', 'Save', and 'Cancel'.

- 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.

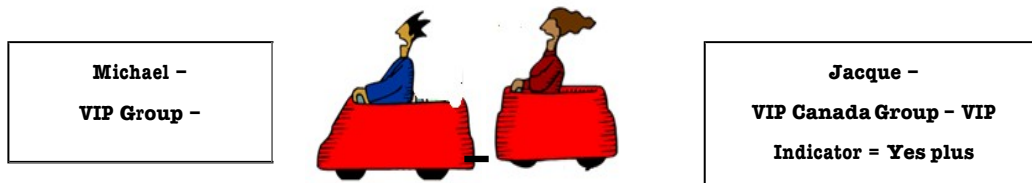
Rules | Service Rules

Legend:  = 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

Buttons: Save Priority Changes, Cancel

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



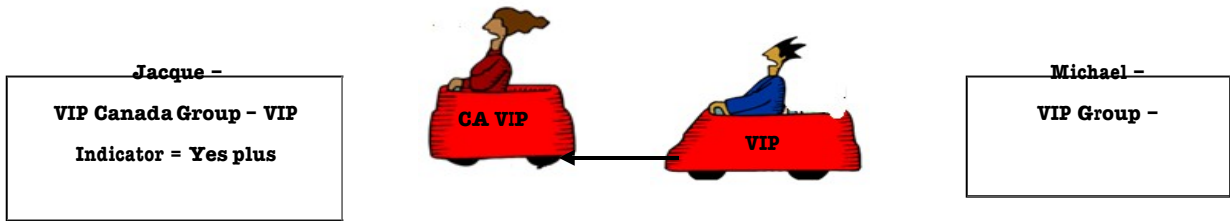
The VIP US Group is higher than VIP Canada Group therefore the VIP US Group’s selection parameters will be taken into consideration first to select users who meet the Group criteria. In our example, both Michael and Jacque have the VIP Indicator set to “Yes” as the selection parameter, therefore both 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.

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

Buttons: Save Priority Changes, Cancel

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



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:

- x Airport Parking
- x 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.

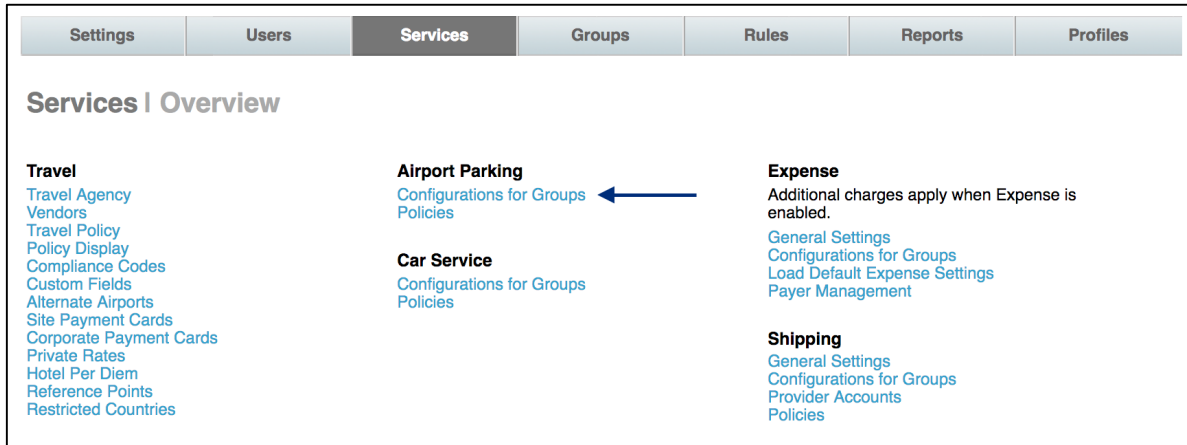
#### 3.1 Airport Parking

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.

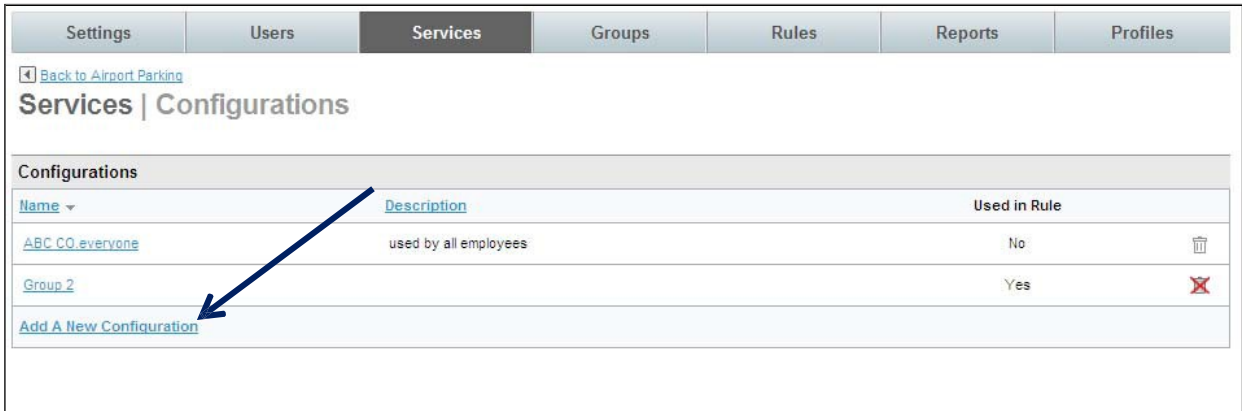
### 3.1.1 Airport Parking Configuration

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

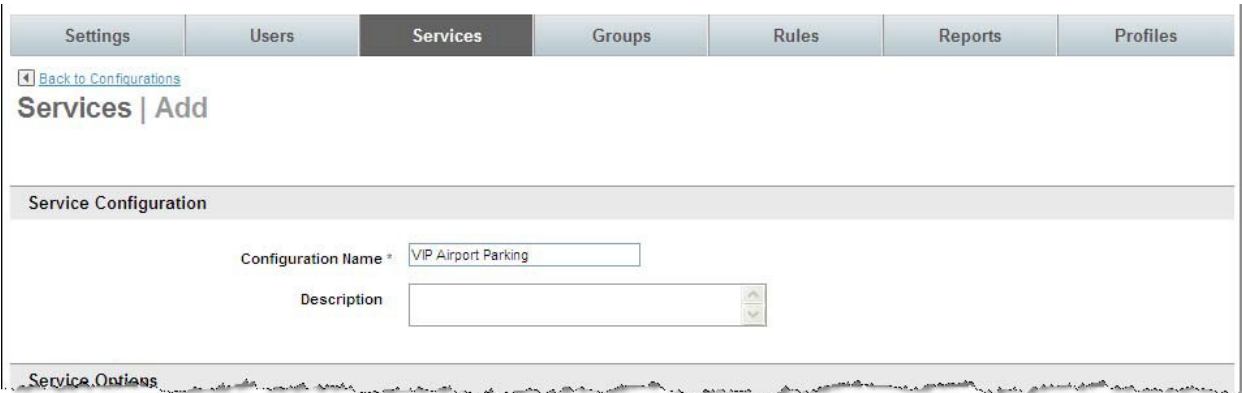


2. The **Services | Airport Parking** page is displayed. Click the **Configurations** link to configure how the service works for different groups.

- 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.



- The **Services | Add** page is displayed. Complete the page  
 x **Service Configuration:**



- **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.

**X Service Options:**

Service Options
<p><b>Search Page Message</b></p> <p>&lt;P&gt;&lt;B&gt;The easy way&lt;/B&gt; 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.&lt;/P&gt;&lt;br/&gt;&lt;P&gt;&lt;B&gt;The safest way&lt;/B&gt; to the airport and back. Parking lots are gated and well-lit. &lt;/P&gt;&lt;br/&gt;&lt;P&gt;&lt;B&gt;The friendly way&lt;/B&gt; to get to your gate. Additional services include luggage assistance, help with dead batteries, and car washes.&lt;/P&gt;&lt;br/&gt;&lt;P&gt;NOTE:&lt;BR&gt;&lt;BR&gt; No coupons, promotions or special rates can be combined with online rates.&lt;BR&gt;- Drop-off and Pick-up times should be the time you want to arrive at the lot, not your flight time.&lt;BR&gt;- Advance booking requirements may vary by location.&lt;/P&gt;</p>
<p><b>Results Page Message</b></p> <p>Select one of the results or modify your search using the tools above.</p>
<p><b>Confirmation Page Message</b></p> <p>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.&lt;P&gt;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.&lt;/P&gt;</p>
<p><b>Cancel Page Message</b></p>
<p><b>Change Page Message</b></p>

- **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.*

- o **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.
  - o **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.
  - o **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.*

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

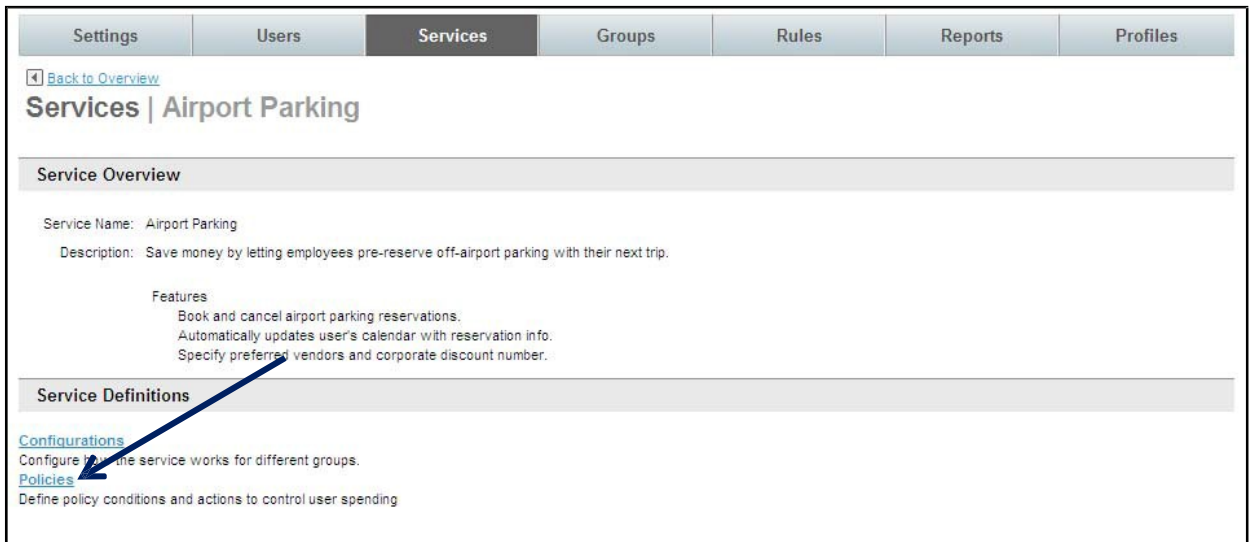
5. Click **Save** to save the configuration. Click the **Back to Airport Parking** link to return to the **Services | Airport Parking** page.

### 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.



The screenshot shows the 'Services | Airport Parking' page. At the top, there is a navigation bar with tabs for Settings, Users, Services (selected), Groups, Rules, Reports, and Profiles. Below the navigation bar, there is a 'Back to Overview' link. The main heading is 'Services | Airport Parking'. Underneath, there is a 'Service Overview' section with the following details:

- 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.

Below the overview, there is a 'Service Definitions' section. It contains two links: 'Configurations' and 'Policies'. A blue arrow points to the 'Policies' link. The text below the links reads: 'Configure how the service works for different groups. 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.



The screenshot shows the 'Services | Policies' page. At the top, there is a navigation bar with tabs for Settings, Users, Services (selected), Groups, Rules, Reports, and Profiles. Below the navigation bar, there is a 'Back to Airport Parking' link. The main heading is 'Services | Policies'. Underneath, there is a 'Policies' section with a table. A blue arrow points to the 'Add A New Policy' link at the bottom of the table.

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.

- f **Policy:**
  - o **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.
  - o **Description:** Enter an optional policy description.
- f **Policy conditions (All conditions must be true for this policy to be activated):**
  - o **Field:** Select the field to use to define this policy

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

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.

f **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.

- 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

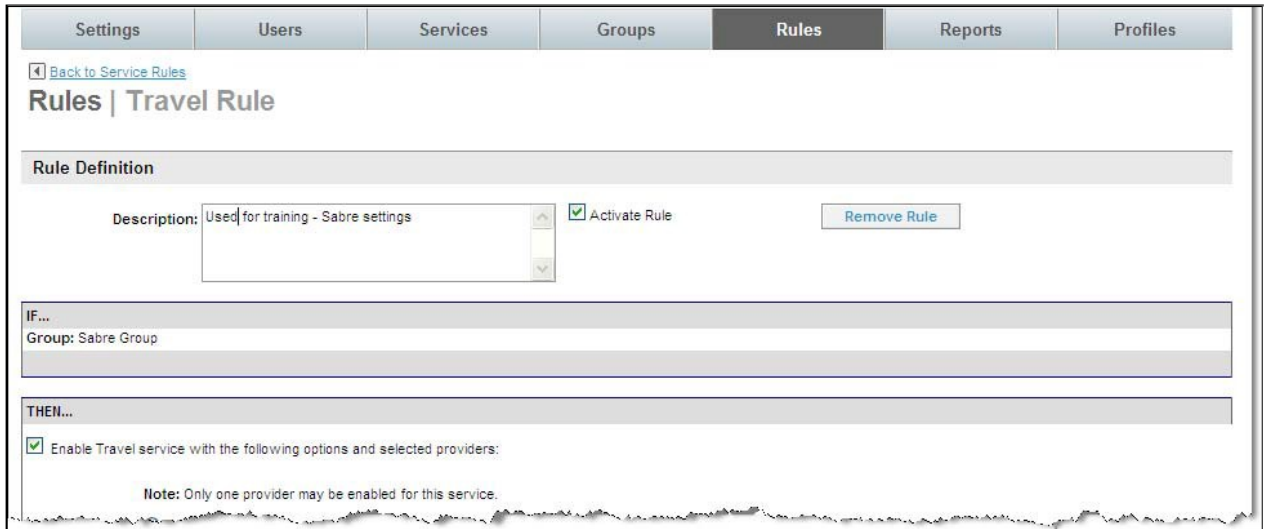
[Back to Overview](#)

### Rules | Service Rules

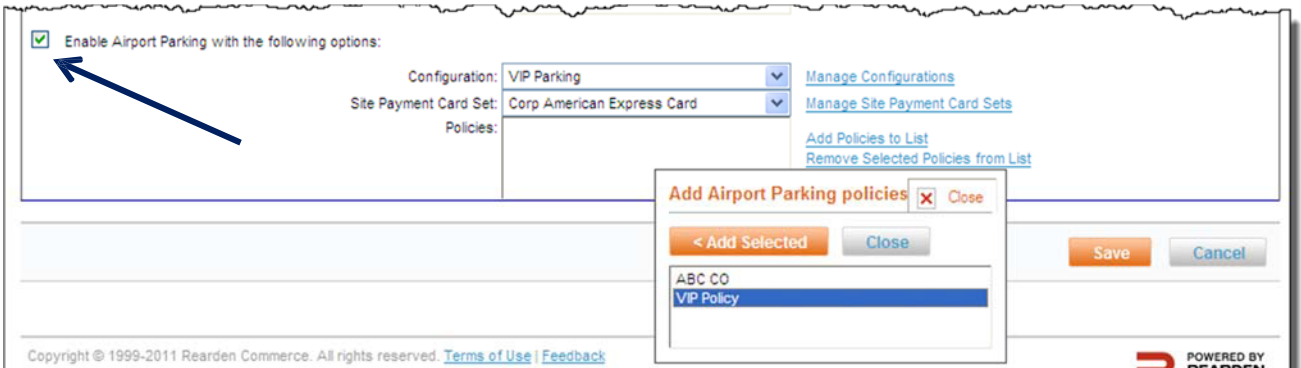
= Inactive Rules
  = Active Rules

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Event Tickets
<input type="text" value="10"/>	<a href="#">Sabre Group</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">Edit</a>
	Everyone	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">Add</a>

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



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



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.

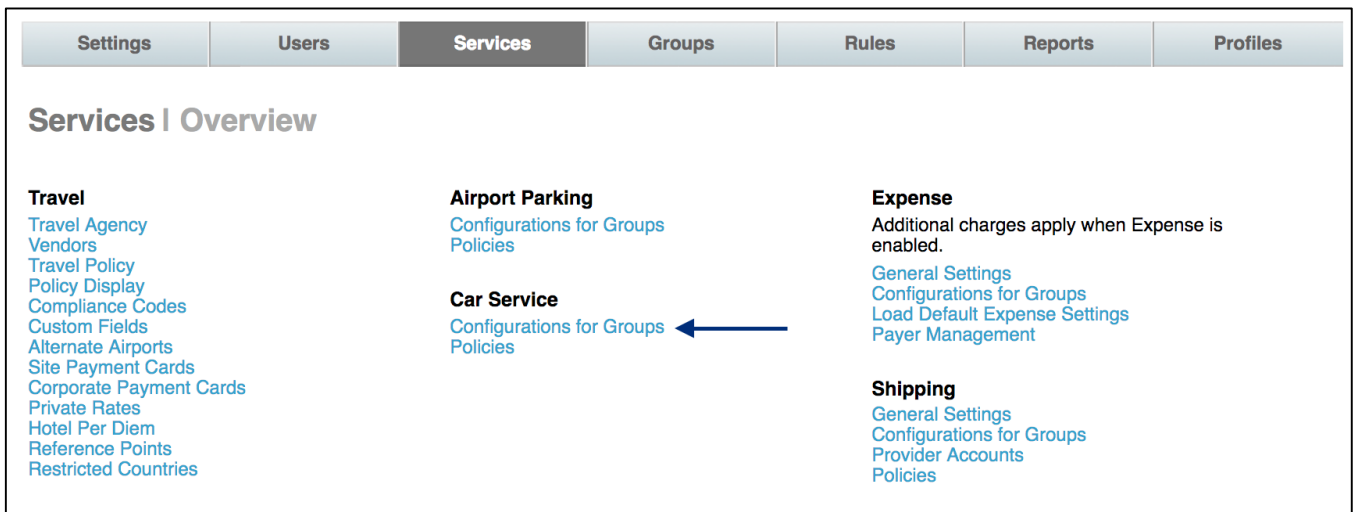
A configuration can include both US and UK (GroundRez) settings.

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

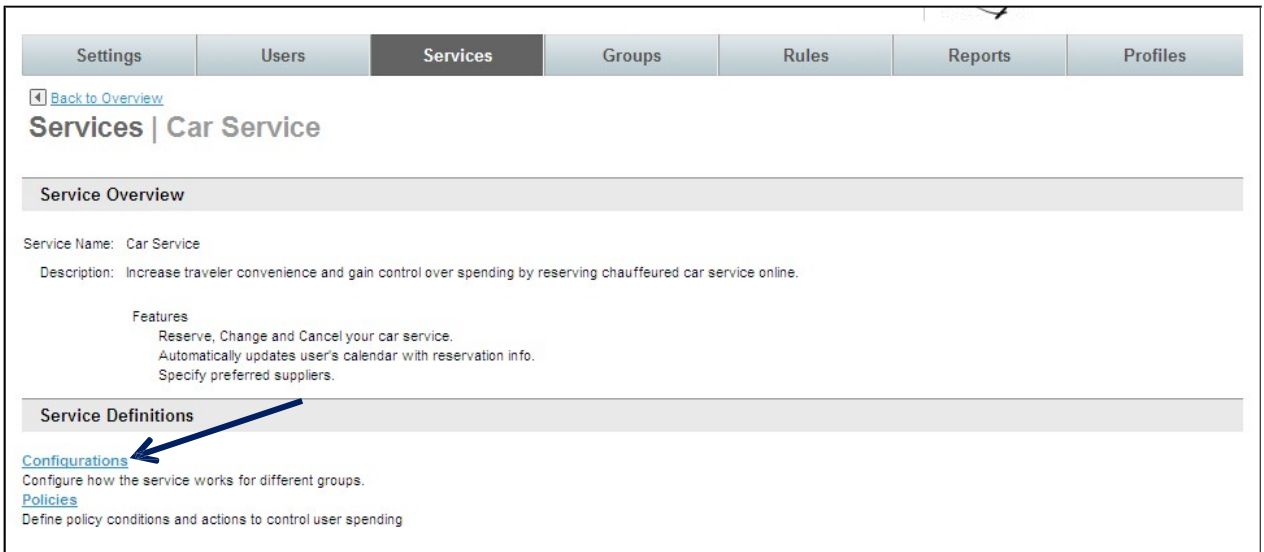
### 3.2.1 Deem Preferred Network Configuration

To configure a Deem Preferred Network:

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



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



- 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
<a href="#">Back to Car Service</a>						
<b>Services   Configurations</b>						
<b>Configurations</b>						
Name	Description	Used in Rule				
<a href="#">ABC co rates</a>	preferred rates for abc co.	No				
<a href="#">Deem Network</a>	enabled for EVERYONE	Yes				
<a href="#">Add A New Configuration</a>						

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

[Back to Configurations](#)

**Services | Edit**

---

**Service Configuration**

Configuration Name \*

Description

---

**Service Options**

Request a Ride Page Message

US Providers

x **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.

x **Service Options:**

- **Request a Ride Page Message:** Default messaging is provided. Make changes as necessary.

### 3.2.1.1 US Providers

The screenshot shows a configuration interface for US Providers. At the top left, there is a checked checkbox labeled 'Enable Ground Travel'. To its right is a 'Company Code \*' field containing '33447'. Below that is a 'Corporate Preferred Vendors' field. A section titled 'Messages Configuration' contains five text input areas:

- Select a Car Page Message:** Contains HTML code: `<b>Vendor Selection Tips</b><br><br>Suppliers are displayed in order of cost - lowest to highest.<br><br>`
- Reserve Your Ride Page Message:** Contains the text: 'reserve your ride page message noted here'
- Reservation Confirmation Page Message:** Contains the text: '<b>Gratuity is included in the trip cost. Please do not tip the driver.</b>'
- Cancellation Page Message:** Contains the text: 'cancellation page message noted here'
- Reservation Status Page Message:** Contains the text: '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 \***  ⓘ

**Cut-off Alert**  ⓘ

**Confirm/Cancel/Status Notification Message**  ⓘ

**Override Provider Support Phone Number**  
**Phone Number**

**Maximum number of stops \***  ⓘ

- **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 –**

- **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

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- **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:**

The screenshot shows the 'UK Providers' configuration page. At the top, there is a section titled 'UK Providers' with a checkbox for 'Enable GroundRez'. Below this, there are several input fields: 'Corporate Code \*' (with a dropdown arrow), 'Cost Center' (checkbox), 'Employee ID' (checkbox), and 'Corporate Preferred Vendors' (with a dropdown arrow). A horizontal dotted line separates this from the 'Messages Configuration' section. This section contains five text areas for messages: 'Select a Car Page Message' (with a placeholder text: '<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', and '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 \*  ⓘ

Cut-off Alert  ⓘ

Confirm/Cancel/Status Notification Message  ⓘ

Override Provider Support Phone Number

Maximum number of stops \*  ⓘ

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:**
    - o **Configuration Name:** Use a name that is easily recognizable as a custom rates vendor.
    - o **Description:** Provide an optional description for the configuration.
  - x **US Providers:**
    - o **Company Code:** Enter the code received from Deem as the custom rates vendor code

- Click **Save** to save the configuration. Click **Back to 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*.

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

The screenshot shows the 'Services | Car Service' page. At the top, there are navigation tabs: Settings, Users, Services (selected), Groups, Rules, Reports, and Profiles. Below the tabs, there is a 'Back to Overview' link. The main heading is 'Services | Car Service'. Underneath, there is a 'Service Overview' section with details for 'Car Service', including a description and features. The 'Service Definitions' section contains two links: 'Configurations' and 'Policies'. A blue arrow points to the 'Policies' link.

- 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.

The screenshot shows the 'Services | Policies' page. At the top, there are navigation tabs: Settings, Users, Services (selected), Groups, Rules, Reports, and Profiles. Below the tabs, there is a 'Back to Car Service' link. The main heading is 'Services | Policies'. Below the heading is a table with the following data:

Name	Description	Used in Rule
<a href="#">QP_A</a>	Vehicle = LIMO	Yes
<a href="#">QP_NA</a>	Rate >=90	Yes

Below the table is a link: [Add A New Policy](#). A blue arrow points to this link.



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

x **Policy:**

- o **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.
  - o **Description:** Enter an optional policy description.
- f **Policy conditions (All conditions must be true for this policy to be activated):**
- o **Field:** Select the field to use to define this policy

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



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

f **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](#)

### Rules | Service Rules

= Inactive Rules
  = Active Rules

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Event Tickets
10	<a href="#">Sabre Group</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">Edit</a>
	Everyone	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Edit</a>	<a href="#">Edit</a>	<a href="#">Add</a>

Save Priority Changes
Cancel

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](#)

### Rules | Travel Rule

**Rule Definition**

Description:   Activate Rule Remove 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:

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

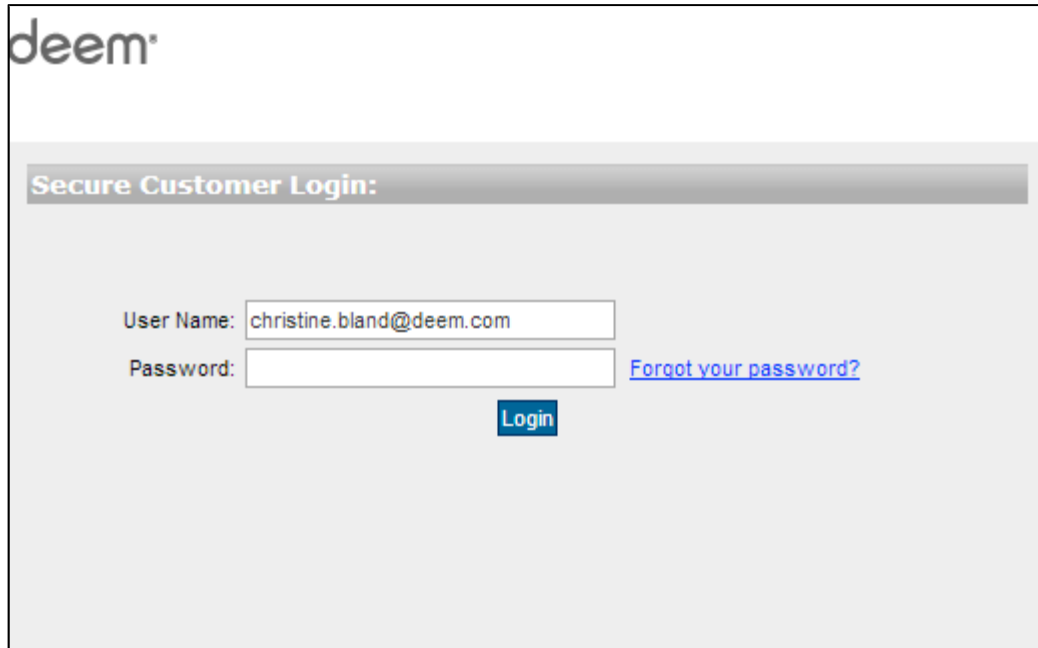
Support Cases are entered for many different reasons. They may be the result of testing that doesn't go exactly as you hoped, or they can contain questions. In this section we will cover how to enter a Support Case that effectively identifies your issue.

### 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.

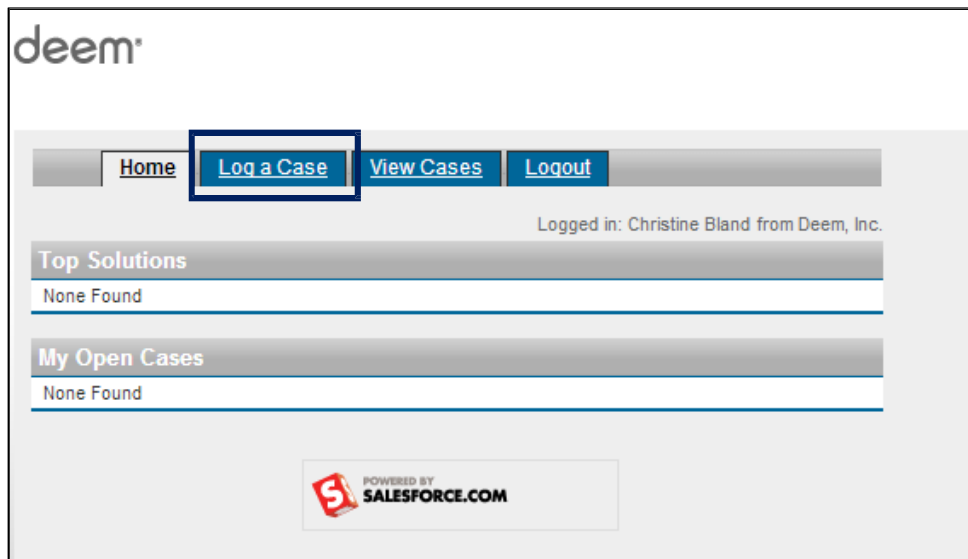
## 4.2 Entering a Support Case for All Issues

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**.



The screenshot shows the Deem Customer Support Portal login page. At the top left is the "deem" logo. Below it is a grey header bar with the text "Secure Customer Login:". Underneath, there are two input fields: "User Name:" with the value "christine.bland@deem.com" and "Password:". To the right of the password field is a blue link that says "Forgot your password?". Below the password field is a blue "Login" button.

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



The screenshot shows the Deem Customer Support Portal Home page. At the top left is the "deem" logo. Below it is a navigation bar with four tabs: "Home", "Log a Case", "View Cases", and "Logout". The "Log a Case" tab is highlighted with a blue border. Below the navigation bar, it says "Logged in: Christine Bland from Deem, Inc.". There are two sections: "Top Solutions" and "My Open Cases", both of which show "None Found". At the bottom, there is a logo for "POWERED BY SALESFORCE.COM".

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.

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Home Log a Case View Cases Logout

**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:	Account Name:
<input type="text"/>	Deem, Inc.
Contact Phone:	Contact Email:
<input type="text"/>	

Alternative Contact Number:

Case Reason:

Scroll down to see bottom of the page:

The screenshot shows a form with the following fields and controls:

- Product:** A dropdown menu with "--None--" selected. Marked as required with an asterisk (\*).
- Customer Priority:** A dropdown menu with "3 - Normal" selected. Marked as required with an asterisk (\*).
- Subject:** A text input field. Marked as required with an asterisk (\*).
- Permission to Test:** A dropdown menu with "--None--" selected. Marked as required with an asterisk (\*).
- Description:** A large text area. Marked as required with an asterisk (\*).
- Steps to Reproduce Error:** A text area. Marked as required with an asterisk (\*).
- Customers Internal Ticket:** A text input field.

At the bottom of the form are two buttons: "Submit" and "Cancel".

x 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



- 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.

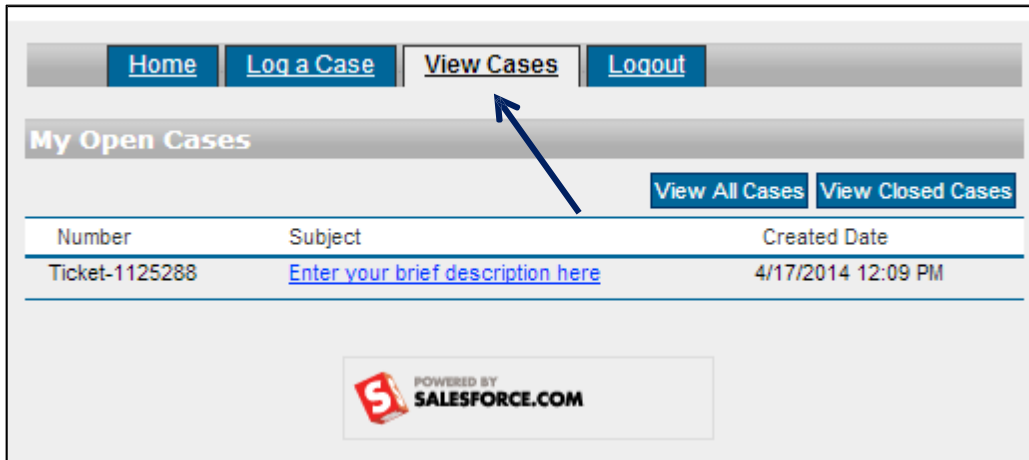
---

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

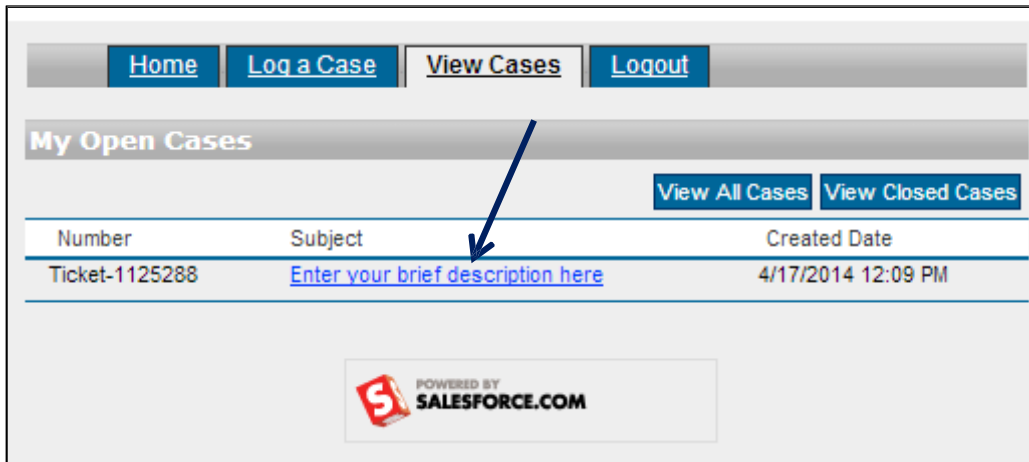
---

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

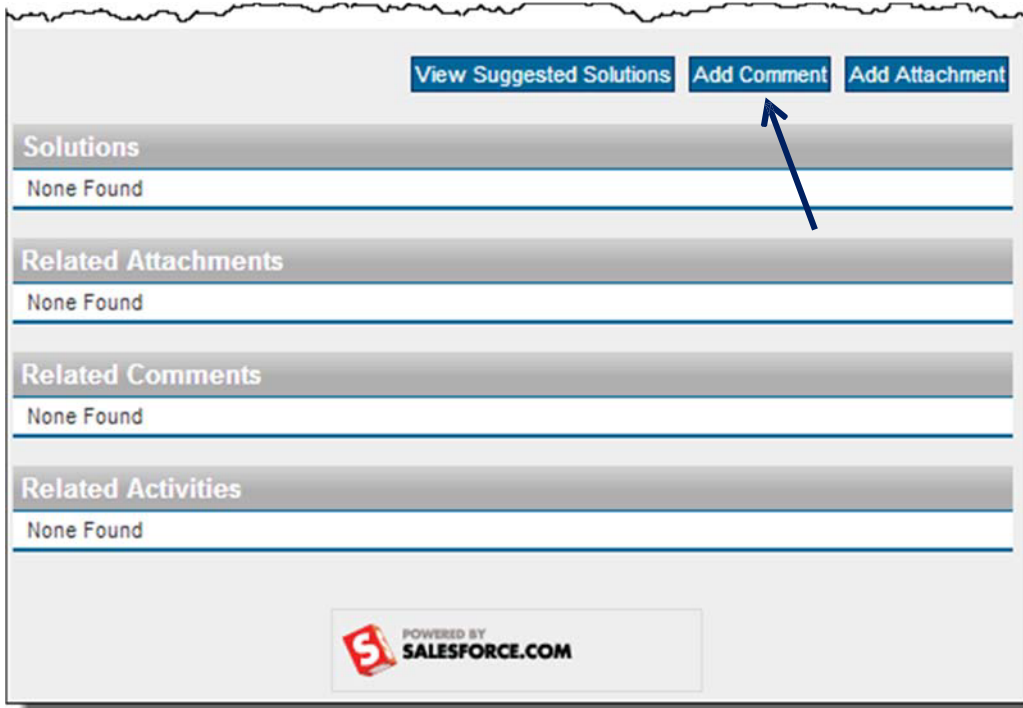
1. Sign into the **Customer Support Portal** using your email address as the **User Name** and **Password**.
2. The **Home** page is displayed. Click the **View Cases** tab to view an existing issue.



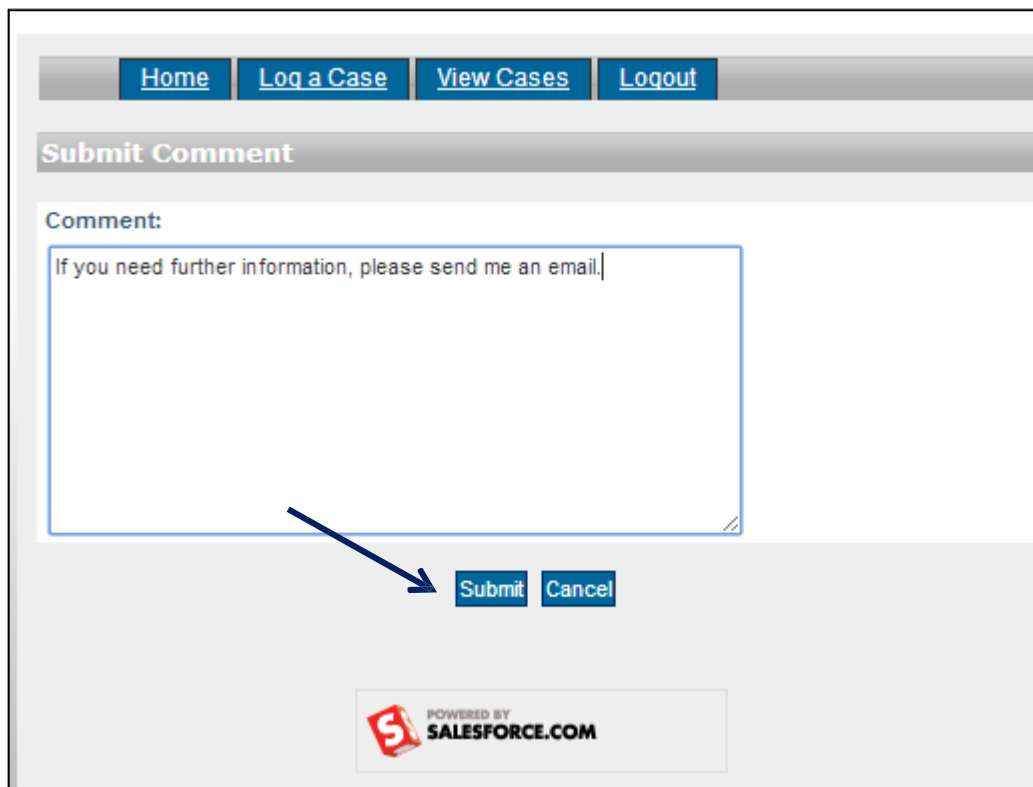
3. While on the **View Cases** tab, click the **Subject** link of the case to view the case.



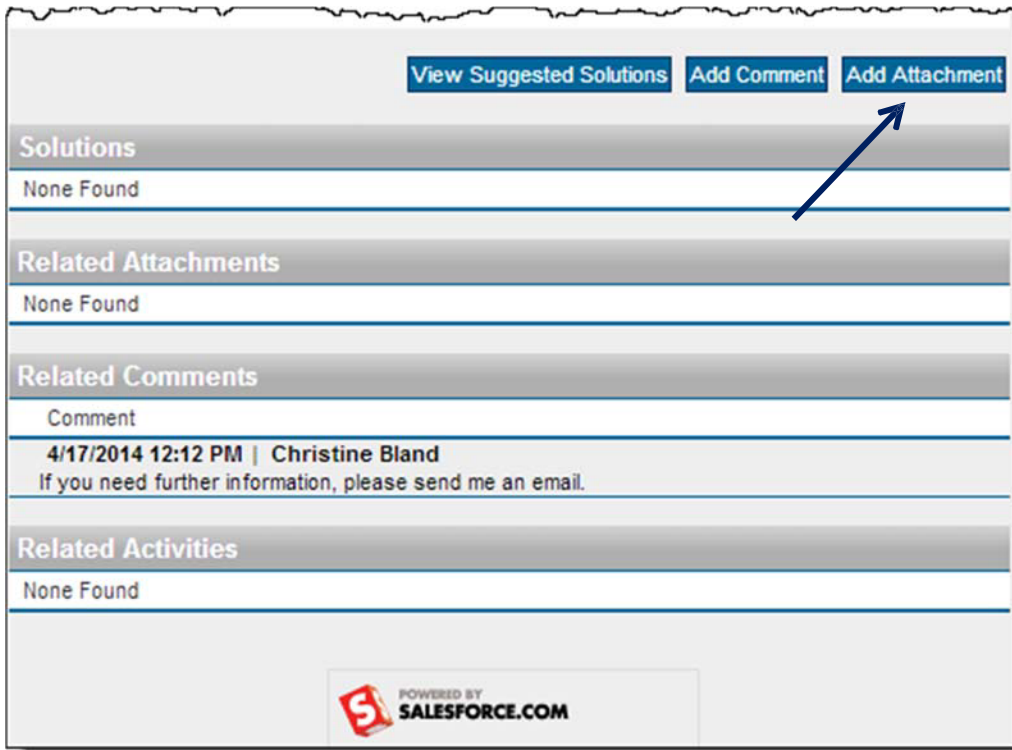
4. Scroll down to the bottom of the page and click the **Add Comment** tab to add a comment to this case.



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



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



- 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

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- 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
<a href="#">Executive Summary V Release.docx</a>	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.

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Home Log a Case View Cases Logout

Logged in: Christine Bland from Deem, Inc.

**Top Solutions**  
None Found

**My Open Cases**  
None Found

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