



Deem Travel: Partner Dashboard Training

Day 3 –

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

April 2021

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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

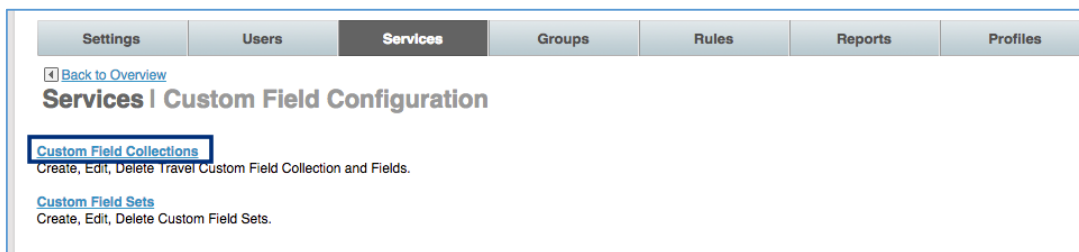
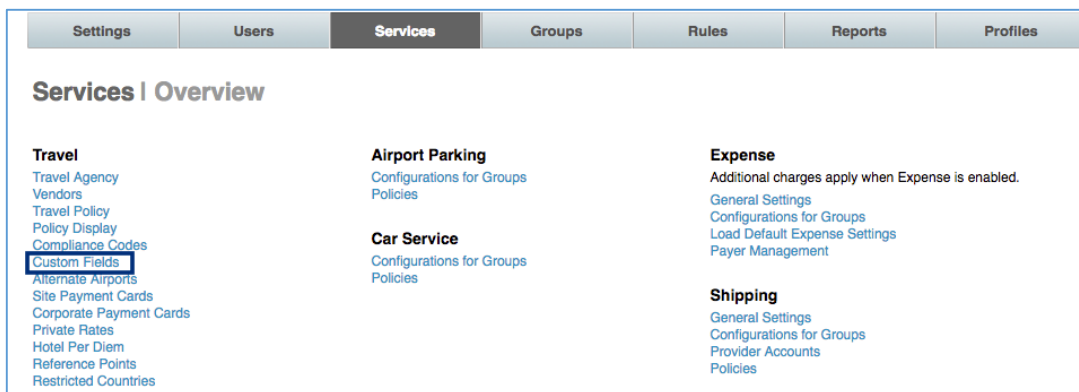
Custom fields are used when agencies require data that is not already being collected by Deem to support either specialized booking or profile requirements. Custom fields can be created using the Deem customizable profile field tool if the field will be used for reporting or by creating a new, custom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

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

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

1. From the Services tab, click the **Custom Fields** link, then click the **Custom Field Collections** link. The Custom Field Collections page appears.



1.1.1 Custom Field Collections

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

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



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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Custom Field Collections](#)

Services | Add

New Collection

Collection Information

Name:

Label:

Description: (Optional) ⓘ
(as displayed to User)

Include Collection in following pages

Ask for User Input on Trip Search Page ⓘ

Make Collection Optional for User ⓘ

Display on Trip Review Page ⓘ

Ask for User Input on Purchase Page ⓘ

Display on Trip Confirmation, Trip Details and eMail Notification Pages ⓘ

Include Collection as part of "Change your trip" pages ⓘ

Conditional Display of Collection

Javascript: (Optional) ⓘ

- 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.
- Include Collection in following pages:
 - Ask for User Input on Trip Search Page: By selecting this checkbox, the user will see the custom field on the Trip Search page.
 - Make Collection Optional for User: By selecting this checkbox, custom field will be required on the Trip Search page.

- Display on Trip Review Page: By selecting this checkbox, the user will see (but not be able to edit) the custom field on the Trip Review page. It is recommended that if the field is displayed on the Trip Search page, it be shown on the Review page as well.
- Ask for User Input on Purchase Page: By selecting this checkbox, the user will see the custom field on the Trip Purchase page.
- Display on Trip Confirmation, Trip Details and email Notification Pages: By selecting this checkbox, the user will see the custom field on the Trip Confirmation, Trip Details and email Notification Pages.
- Include Collection as part of “Change your trip” pages: By selecting this checkbox, the user will see the custom field on “Change your trip” pages.
- Conditional Display of Collection:
- 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.

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

[Add A New Collection](#)

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Custom Field Collections](#)

Services | Custom Fields

Custom Fields for Collection "TripPurpose"

Collection Name: TripPurpose

Custom Field Collections

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

Done

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Custom Fields](#)

Services | Add

New Field (Collection:TripPurpose)

Field Information

Name:

Label:

Tool Tip: (Optional)

Field Type:

Add to Open Enrollment Registration

Add to User Settings

Category:

Allow only Agency to View and Edit this field

Mandatory Field

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

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

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

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

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

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

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

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

o Field Type Preference – Text

Field Type Preference

Single Line Multiple Line

Number of Lines: (1 min, 20 max)

Character Width: (1 min, 30 max)

Min Length: (1 min if required)

Max Length: (>= Min Length)

Default Value: (Optional)

[Advanced](#)

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

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

Additional Information

Agency Remark 1

Special Requirements

o Field Type Preference – Checkbox

Field Type Preference

Check Box Default: checked unchecked

User must select checkbox to proceed

[Advanced](#)

- 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.

Travel | Mandatory Profile Fields

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

Terms & Conditions*

o 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](#)

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

- Date Range: Enter the beginning and ending date range allowed. Generally, 1 and 31 are used.
- o 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*
 ⓘ

○ Field Type Preference – List

The screenshot shows a dialog box titled "Field Type Preference". On the left, it says "List (single-select)". The "Display as:" section has two radio buttons: "Select Box" (which is selected) and "Radio Buttons (if <= 3 options)". To the right of these is a "Vertical Align" dropdown menu. Below this is the "Option Labels and Values:" section, which contains a text input field with the text "Meet with Clients" on the first line and "Training Class" on the second line. To the right of this input field are up and down arrow buttons and a small icon. Below the input field is a checkbox labeled "Sort labels alphabetically". The "Default:" section has three radio buttons: "Select first value as default" (selected), "Select value prefixed with '*' as default", and "Select no value as default". At the bottom left, there is a link labeled "Advanced". At the bottom right, there are two buttons: "Save" (orange) and "Cancel" (grey).

- 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.

The screenshot shows a dropdown menu for a field labeled "Employee Type*". The dropdown is open, showing the following options: "Employee" (with a small downward arrow), "(Please select)", "Employee" (highlighted in blue), "Guest", and "Temp". At the bottom right of the dropdown menu, there is an orange "Save" button.

- Click **Save** to save the Custom Field.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Custom Field Collections](#)

Services | Custom Fields

Custom Fields for Collection "TripPurpose"

Collection Name: TripPurpose

Custom Field Collections

Display Order ▲	Field Name	Field Type	User Profile Field	Last Update	Action
<input type="text" value="1"/>	TripPurpose	Text	No	June 09, 2009	

[Update Display Order](#) [Add Custom Field](#)

[Done](#)

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

1.1.2 Custom Fields Sets

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Travel Configuration](#)

Services | Custom Field Configuration

[Custom Field Collections](#)
Create, Edit, Delete Travel Custom Field Collection and Fields.

[Custom Field Sets](#)
Create, Edit, Delete Custom Field Sets.

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Custom Field Configuration](#)

Services | Custom Field Sets

Custom Field Sets

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

[Add A New Custom Field Set](#)

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Custom Field Sets](#)

Services | Add

Custom Field Set

Set Name:

Custom Field Collections

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

[Add Collection to Set](#)

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Add](#)

Services | Add Custom Field Collection

Add Custom Field Collection

[Custom Field Collection](#)

<input type="checkbox"/>	agencyinfo
<input type="checkbox"/>	reportinginfo
<input checked="" type="checkbox"/>	TripPurpose

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Custom Field Sets](#)

Services | Add

Custom Field Set

Set Name:

Custom Field Collections

Display Order	Collection Name	Last Update	Action
<input type="text" value="1"/>	TripPurpose	June 09, 2009	Edit Delete

[Update Display Order](#) [Add Collection to Set](#)

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

1.2 Vendor Management

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

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

1.2.1 Vendor Management List Items

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

1. After clicking the **Services** tab, click the **Vendors** link and follow these instructions to manage vendor preferences :

2. The Services | Travel page is displayed. Click the **Vendor Management** link.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Overview](#)

Services | Travel

[Agency Configuration](#)
Configure travel agency settings.

[Vendor Management](#)
Configure vendor preferences and restrictions.

[Travel Policy Management](#)
Configure travel policies.

[Display Configuration](#)
Configure how the system displays policy related information.

[Compliance Codes](#)
Create a list of codes for policy compliance.

[Custom Field Configuration](#)
Create and manage Custom Fields.

[Alternate Airports Management](#)
Create alternate codes for airports and configure them.

[Site Charge Cards](#)
Create a list of charge cards to be used for the site.

[Corporate Charge Cards](#)
Create charge card types allowed by the system.

[Private Rates](#)
Configure custom private rates.

[Hotel Per Diem Editor](#)
Define and manage hotel per diems.

[Reference Points](#)
Create a list of reference points.

[Restricted Countries Configuration](#)
Create a list of Restricted Countries.

3. The Services | Vendor Management page is displayed.

1.2.1.1 Airline Preferences

1. Click the Airline Preferences link.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Travel Configuration](#)

Services | Vendor Management

Vendor Preferences

- [Airline Preferences](#)
- [Car Rental Preferences](#)
- [Hotel Chain Preferences](#)

Vendor Preference Sets

- [Airline Preference Sets](#)
- [Car Rental Preference Sets](#)
- [Hotel Chain Preference Sets](#)

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Vendor Management](#)

Services | Airline Preferences

Airline Preferences

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

[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.

Location Preferences

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

Separate multiple airport codes or city names with semicolons.

From Location: by airport codes by states by countries anywhere

[Airport Code](#)

To Location: by airport codes by states by countries anywhere

Alaska ▲
 Alabama ▲
 Arkansas ▲
 Arizona ▲
 California ▼

Bi-Directional: Yes No

Through Location: by airport codes by states by countries anywhere

Afghanistan ▲
 Albania ▲
 Algeria ▲
 American Samoa ▲
 Andorra ▼

Current Selection is: United States

Preferred Airlines

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



The screenshot shows a form titled "Preferred Airlines" with the following fields and options:

- 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. Use a comma between each airline.
 - 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.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Car Rental Preferences						
<h2>Services Add</h2>						
<h3>General Settings</h3>						
<input checked="" type="checkbox"/> Activate Preference						
Name: <input type="text"/>						
Preference Start Date: <input type="text"/> - <input type="text"/> - <input type="text"/> <input type="text"/>						
Preference End Date: <input type="text"/> - <input type="text"/> - <input type="text"/> <input type="text"/>						
<h3>Location Preferences</h3>						
<input checked="" type="radio"/> Apply globally (regardless of location)						
<input type="radio"/> Apply to specific locations (set locations below)						
<h3>Preferred Car Rental Companies</h3>						
Most Preferred Car Rental Companies: <input type="text"/> Location Code: <input type="text"/>						
Highly Preferred Car Rental Companies: <input type="text"/> Location Code: <input type="text"/>						
Preferred Car Rental Companies: <input type="text"/> Location Code: <input type="text"/>						
Flag the Preferred Car Rental Companies as Preferred?: <input checked="" type="radio"/> Yes <input type="radio"/> No						
<h3>Restricted Car Rental Companies</h3>						
Car Rental Companies to be excluded: <input type="text"/>						
Car Rental Companies to be displayed last: <input type="text"/>						
Car Rental Companies to be displayed after similar car rental companies: <input type="text"/>						
Remove logo of restricted car rental companies: <input type="radio"/> Yes <input checked="" type="radio"/> No						
<input type="button" value="Save"/> <input type="button" value="Cancel"/>						

- Car Rental Preferences:
 - ◆ General Settings:
 - Activate Preference: Select the checkbox to activate the preference.
 - Name: Name the car rental preference to help recognize the market to which it applies. An example is DFW to show that this car rental preference is for the market in Dallas.
 - Preference Start Date: Select the Month, Day and Year from the drop down list or click the calendar and make the selection on the calendar if the preference will not take effect upon the save of the record.
 - Preference End Date: Select the Month, Day and Year from the drop down list or click the calendar and make the selection on the calendar if the preference has an anticipated end date.
 - ◆ Location Preference:
 - Apply globally (regardless of location): Select this radio button if the preference applies to all locations
 - Apply to specific locations (set locations below): Select this radio button if the preference applies to specific locations.

- Separate multiple airport codes or city names with semicolons
 - If by airport codes was selected, enter the airport codes separated by semi-colons

Location Preferences

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

Separate multiple airport codes or city names with semicolons.

Location: by airport codes by states by countries anywhere

[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

Preferred Car Rental Companies:

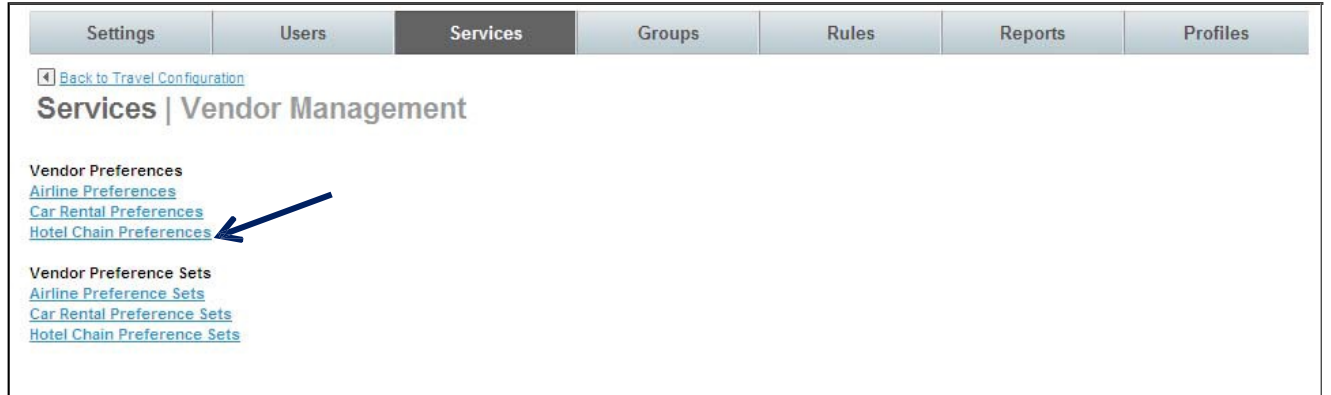
- Most Preferred Car Rental Company / Location Code: List the car rental company codes and location codes, if applicable, to have them displayed at the top of the search results page.
 - Highly Preferred Car Rental Company / Location Code: List the car rental company codes and location codes, if applicable, 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.
- o Restricted Car Rental Companies:
- Car Rental Companies to be excluded: Enter the car rental company codes whose search results will not be displayed regardless if they meet trip search criteria.
 - Car Rental Companies to be displayed last: Enter the car rental company codes for car rental companies whose search results will be displayed at the bottom of the list regardless if they would fall elsewhere in the list.
 - Car Rental Companies to be displayed after similar car rental companies: Enter the car rental company codes for car rental companies whose search results will be displayed with other entries if the results are similar to those entries.
 - Remove logo of restricted car rental companies: Select Yes or No from the drop down list to not display the logo of a restricted car rental company beside search results for that car rental company.

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

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

1.2.1.3 Hotel Chain Preferences

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



- 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.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Vendor Management						
<h2>Services Hotel Chain Preferences</h2>						
<h3>Hotel Chain Preferences</h3>						
Name	Location	Preferred	Restricted	End Date		
ABC Hotels	Los Angeles, CA, US; New York, NY, US; San Francisco, CA, US	HY, HH, MC	KL, SI	Copy	✖	
Sacramento Hotels	Sacramento, CA, US	RD, HY, SI	LQ, RC, GI	Copy	✖	
Foster City Hotels	Foster City, CA, US	CP, MC, HH	HI	Copy	✖	
Add A New Hotel Chain Preference						

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

Settings	Users	Services	Groups	Rules
Back to Hotel Chain Preferences				
<h2>Services Add</h2>				
<h3>General Settings</h3>				
Name: <input type="text" value="Corp Traveler"/>				
<input checked="" type="checkbox"/> Activate Preference				
Preference Start Date: <input type="text" value="-"/> <input type="text" value="-"/> <input type="text" value="-"/> <input type="text" value=""/>				
Preference End Date: <input type="text" value="-"/> <input type="text" value="-"/> <input type="text" value="-"/> <input type="text" value=""/>				
<h3>Location Preferences</h3>				
<input checked="" type="radio"/> Apply globally (regardless of location)				
<input type="radio"/> Apply to specific locations (set locations below)				
<h3>Preferred Hotel Chains</h3>				
Most Preferred Hotel Chain: <input type="text" value="WY,YS,GV"/>				
Highly Preferred Hotel Chain: <input type="text" value="NK,MR,MU"/>				
Preferred Hotel Chain: <input type="text" value="HL,HH,HX"/>				
Flag the Preferred Hotels as Preferred?: <input checked="" type="radio"/> Yes <input type="radio"/> No				
<h3>Restricted Hotel Chains</h3>				
Hotel chains to be excluded: <input type="text" value="DI"/>				
Hotel chains to be displayed last: <input type="text" value="HY"/>				
Hotel chains to be displayed after similar hotels: <input type="text" value="GI"/>				
Remove logo of restricted hotels: <input checked="" type="radio"/> Yes <input type="radio"/> No				
Remove pictures and video of restricted hotels: <input checked="" type="radio"/> Yes <input type="radio"/> No				
<input type="button" value="Save"/> <input type="button" value="Cancel"/>				

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

Name: Name the Hotel Chain preference to help recognize the market to which it applies. An example is Dallas Hotel Preferences to show that this hotel chain preference is for the market of Dallas.

- Preference Start Date: Select the Month, Day and Year from the drop down list or click the calendar and make the selection on the calendar if the preference will not take effect upon the save of the record.
- Preference End Date: Select the Month, Day and Year from the drop down list or click the calendar and make the selection on the calendar if the preference has an anticipated end date.
- Location Preference:
 - Apply globally (regardless of location): Select this radio button if the preference applies to all locations
 - Apply to specific locations (set locations below): Select this radio button if the preference applies to specified locations.
 - Separate multiple place names with semicolons.
 - Location:
 - If by place names was selected, enter the cities, states and countries separated by semi-colons. An example: Sacramento,CA,US;San Francisco,CA,US.

Location Preferences

Apply globally (regardless of location)

Apply to specific locations (set locations below)

Separate multiple place names with semicolons.

Location: by place names by states by countries anywhere

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

The screenshot shows the 'Location Preferences' section of a web form. At the top, there are two radio buttons: 'Apply globally (regardless of location)' and 'Apply to specific locations (set locations below)'. The second option is selected. Below this, a text instruction reads 'Separate multiple place names with semicolons.' Underneath, there are four radio buttons for 'Location': 'by place names', 'by states', 'by countries', and 'anywhere'. The 'by states' option is selected. A dropdown menu is open, showing a list of US states: Alaska, Alabama, Arkansas, Arizona, and California. The bottom of the form is partially obscured by the text 'Preferred Hotel Chains'.

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

The screenshot shows the 'Location Preferences' section of a web form. At the top, there are two radio buttons: 'Apply globally (regardless of location)' and 'Apply to specific locations (set locations below)'. The second option is selected. Below this, a text instruction reads 'Separate multiple place names with semicolons.' Underneath, there are four radio buttons for 'Location': 'by place names', 'by states', 'by countries', and 'anywhere'. The 'by countries' option is selected. A dropdown menu is open, showing a list of countries: Afghanistan, Albania, Algeria, American Samoa, and Andorra. Below the dropdown, it says 'Current Selection is: United States'. The bottom of the form is partially obscured by the text 'Preferred Hotel Chains'.

- If anywhere was selected, no additional selections are needed
- Preferred Hotel Chains:
 - Most Preferred Hotel Chain: List the hotel chain codes to have them displayed on the search results page. **PREFERRED** will be placed beside this entry and when hovering over the label, a box describing this property as a Most Preferred Hotel Chain is displayed.
 - Highly Preferred Hotel Chain: List the hotel chain codes to have them displayed on the search results page. **PREFERRED** will be placed beside this entry and when hovering over the label, a box describing this property as a Highly Preferred Hotel Chain is displayed.
 - Preferred Hotel Chain: List the hotel chain codes to have them displayed on the search results page. **PREFERRED** will be placed beside this entry and when hovering over the label, a box describing this property as a Preferred Hotel Chain is displayed.
 - Flag the Preferred Hotels as Preferred: If Yes is selected, the search results will be displayed as outlined above (Most Preferred followed by Highly Preferred and then Preferred Hotels) and **PREFERRED** will be displayed beside the hotel chain information. When hovering over the label, a box describing this as a Most Preferred Hotel Chain, Highly Preferred Hotel Chain or Preferred Hotel Chain is displayed.

- Restricted Hotel Chains:
 - Hotel Chains to be excluded: Enter the hotel chain codes whose search results will not be displayed regardless if they meet trip search criteria.
 - Hotel Chains to be displayed last: Enter the hotel chain codes for hotel chains whose search results will be displayed at the bottom of the list regardless if they would fall elsewhere in the list.
 - Hotel Chains to be displayed after similar hotels: Enter the hotel chain codes for hotel chains whose search results will be displayed with other entries if the results are similar to those entries.
 - Remove logo of restricted hotels: Select Yes or No from the drop down list to not display the logo of restricted hotels.
 - Remove pictures and video of restricted hotels: Select Yes or No from the drop down list to not display any pictures or videos from a restricted hotel.

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

1.2.2 Vendor Management Sets

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

The screenshot shows the 'Services | Hotel Chain Preference Sets' 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 Vendor Management](#). The main heading is 'Services | Hotel Chain Preference Sets'. Below this is a table titled 'Hotel Chain Preference Sets' with two columns: 'Preference Set Name' and 'Used In Rule'. The table contains three rows: 'hk', 'Sacramento', and 'H/C Hotel', all with 'No' in the 'Used In Rule' column. Below the table is a button labeled 'Add A New Hotel Chain Preference Set', which is highlighted with a blue box.

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

The screenshot shows the 'Services | Add' page for creating a new Hotel Chain Preference Set. 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 Hotel Chain Preference Sets](#). The main heading is 'Services | Add'. Below this is a form titled 'Hotel Chain Preference Set' with a text input field for 'Preference Set Name' containing 'Misc Hotel Set'. Below the form is a table titled 'Hotel Chain Preferences' with columns: Name, Location, Preferred, Restricted, and End Date. The table is empty, and a message below it says 'You do not have a Hotel Chain Preference defined in this set'. At the bottom right, there are three buttons: 'Save', 'Add Preference', and 'Cancel'.

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

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

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

5. Select the radio button beside the Preference List name to add it to the set. Click OK if there is only one list to add, or click the OK & Add Another if others need to be added to the set. Click Save to save the preferences in the set.
6. Click the “_ changes not applied” link to review the changes.
7. The changes made since the last commit are displayed. Click the Commit button to commit the changes to the database.

2 Rules and Groups

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

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

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

2.1 Rules Tab

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

In an earlier Basic Dashboard Training session, 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 [☰](#) 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.

Test TMC presents
Partner Dashboard

0 changes not applied

4 Test Company

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.

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.

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.

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

Dining - Used to establish rules for groups enabling Dining

Conferencing - Used to establish rules for groups enabling Conferencing

Corporate Admin Portal - Used by the domain or corporate administrator to enable other contracted stores

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

Expenses - Used to establish rules for groups enabling Expense

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

Shopping - Used to establish rules for groups enabling Shopping.

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

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

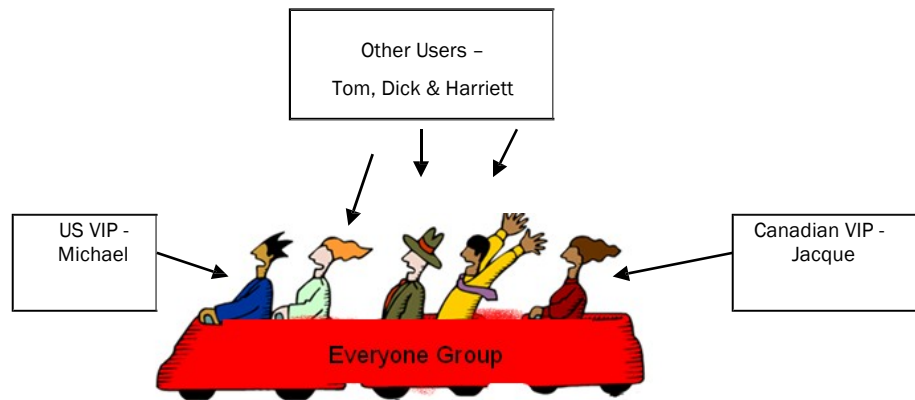
- Add link indicates there are currently no rules established for the group for the specific service
- Edit link with GREEN coloration indicates there are rules established for the group for the specific service and they are active
- Edit link with YELLOW coloration indicates there are rules established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

2.1.1 Travel Rules for the Everyone Group

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

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

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



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

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

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Service Rules						
<h2>Rules Travel Rule</h2>						
Rule Definition						
Description:		<input type="text" value="Everyone Rule"/>			<input checked="" type="checkbox"/> Activate Rule	
IF...						
Group: Everyone						

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

IF...
Group: Everyone

THEN

Enable Travel with the following options and selected providers:

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

Enable ResAssist
 Enable GetThere/RezPort
 Enable Rearden Travel

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

Travel mode: Full service

Train Travel
 Enable Train

Vendor Preferences

Airline Preference Set: Continental and US global pref [Add/Edit Airline Sets](#)

Rental Car Preference Set: Rental Car Preferences [Add/Edit Rental Car Sets](#)

Hotel Chain Preference Set: Hotel Preferences [Add/Edit Hotel Sets](#)

Restricted Countries
Restricted Countries Set: Restricted Countries [Add/Edit Restricted Countries Sets](#)

Travel Policies
Policy Set: Default Travel Policy [Add/Edit Policy Sets](#)

4. Click the Enable Travel service with the following options and selected providers checkbox and select the Enable Rearden Travel radio button.

5. Continue down the page:

☒ Travel Mode:

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

☒ Enable Train

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

☒ Vendor Preferences:

- Airline Preference Set: Select the Airline Preference Set previously configured from the

drop down list. If a new configuration is needed or to review an existing set, click the Add / Edit Airline Sets link to go to the configuration page.

- The Rules | Airline Preference Sets page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
Rules Airline Preference Sets						
Airline Preference Sets						
<u>Preference Set Name</u>		<u>Used In Rule</u>				
Sacramento		No				
AI AIR SET		No				
AFD Property Mgt		Yes				
Add A New Airline Preference Set						

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
Rules Car Rental Preference Sets						
Car Rental Preference Sets						
<u>Preference Set Name</u>		<u>Used In Association</u>				
AI CAR SET		No				
CARIE'S SET		Yes				
Add A New Car Rental Preference Set						

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

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
Rules Hotel Chain Preference Sets						
Hotel Chain Preference Sets						
Preference Set Name	Used In Association					
hk	Yes					
Sacramento	No					
IHC Hotel	No					
Add A New Hotel Chain Preference Set						




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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
Rules Restricted Countries Configuration Sets						
Restricted Countries Configuration Sets						
Set Name	Used In Rule				Last Update	
You do not have any Restricted Countries Configuration Sets defined						
Add Restricted Countries Configuration Set						

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

Note: Please refer to Day 2 Manual: Travel (Part Two) for configuration of Travel Policies discussion.

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Policy Sets</h2>						
Policy Sets						
Set Name ▾		Used In Rule		Last Update		
Guest Travel		No		August 16, 2007		
Everyone		No		August 16, 2007		
Sacramento		No		August 21, 2007		
Add A New Travel Policy Set						

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

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

The screenshot displays a series of configuration sections, each with a dropdown menu and a corresponding 'Add/Edit' link:

- 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](#)

◆ Compliance Codes:

Note: Please refer to Day 2 Manual: 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
Back to Travel Rule						
<h2>Rules Compliance Codes Sets</h2>						
<h3>Compliance Codes Sets</h3>						
Set Name	Type	Used In Rule	Last Update			
Air Compliance Codes	Airline	Yes	October 25, 2010	✘		
Airline Compliance Codes	Airline	Yes	September 22, 2010	✘		
Car Rental Compliance Codes	Car Rental	Yes	April 21, 2008	✘		
Charge Card Compliance Codes	Payment Card	Yes	April 21, 2008	✘		
Dummy Train	Train	Yes	June 22, 2009	✘		
Hotel Compliance Codes	Hotel	Yes	April 21, 2008	✘		
dummy CC set	Payment Card	Yes	October 28, 2008	✘		
Add A New Compliance Code Set						

- Select the Set Name link to review the set or click Add A New Compliance Code Set to add a new set.
 - o 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.)
 - o 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.)
 - o 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.)
 - o 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.)
 - ◆ Agency Configuration:

Note: Please refer to Day 1 Manual: Travel (Part One) for an Agency Configuration discussion.

- o 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
Back to Travel Rule						
<h2>Rules Agency Settings</h2>						
Agency Settings						
Setting Name ▾	GDS	PCC	Location	Used In Rule		
Agency Configuration	Sabre	1234	SFO	No		
Add A New Agency Setting						

- Select the Setting Name link to review the set or click Add A New Agency Setting to add a new set.
- ◆ Alternate Airports:

Note: Please refer to Day 2 Manual: 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
Back to Travel Rule						
<h2>Rules Alternate Airport Sets</h2>						
Alternate Airport Sets						
Set Name ▾	Used In Rule	Last Update				
Charlotte Based	Yes	May 15, 2009				
Sacramento	Yes	March 03, 2008				
TPA-BOS	No	March 03, 2008				
VA	Yes	March 03, 2008				
Add A New Alternate Airport Code Set						

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

Note: Please refer to Day 2 Manual: 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
Back to Travel Rule						
<h2>Rules Display Configuration Sets</h2>						
Display Configuration Sets						
Set Name ▾		Used In Rule	Last Update			
Guest Travel		No	August 22, 2007			
Everyone		No	August 21, 2007			
Add A New Display Configuration Set						

- Select the Set Name link to review the set or click Add A New Display Configuration Set to add a new set.
- ◆ Corporate Payment Card Restrictions:
 - 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
Back to Travel Rule						
<h2>Rules Corporate Payment Card Sets</h2>						
Corporate Payment Card Sets						
Set Name ▾		Used In Rule	Last Update			
XYZ hotel.GTD		No	August 21, 2007			
Add a new payment card set						

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

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Site Payment Cards Sets</h2>						
<h3>Site Payment Cards Sets</h3>						
Set Name ▾		Used In Rule	Last Update			
Corp American Express Card		No	October 25, 2010			
Add a new site payment card set						

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Hotel Per Diem Sets</h2>						
<h3>Hotel Per Diem Sets</h3>						
Set Name ▾		Used In Rule	Last Update			
MCO		No	May 15, 2009			
Add A New Hotel Per Diem Set						

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

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

The screenshot displays a web form with the following sections:

- 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](#)

Below these sections are two main options:

- Enable Airport Parking with the following options:**
 - Configuration: ABC CO.everyone. [Manage Configurations](#)
 - Site Payment Card Set: None. [Manage Site Payment Card Sets](#)
 - Policies: [Empty list]. [Add Policies to List](#), [Remove Selected Policies from List](#), [Manage All Policies](#)
- Enable Car Service with the following options:**
 - Configuration: Deem Network. [Manage Configurations](#)
 - Reference Points Set: None. [Manage Reference Points Sets](#)
 - Payment Card Set: None. [Manage Payment Card Sets](#)
 - Site Payment Card Set: None. [Manage Site Payment Card Sets](#)
 - Policies: [Empty list]. [Add Policies to List](#), [Remove Selected Policies from List](#), [Manage All Policies](#)

At the bottom right, there are **Save** and **Cancel** buttons.

◆ Reference Points:

Note: Please refer to Day 2 Manual: Travel (Part Two) for configuration of Reference Point discussion.

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

- The Rules | Reference Point Sets page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles						
Back to Travel Rule												
<h2>Rules Reference Point Sets</h2>												
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> <th></th> </tr> </thead> <tbody> <tr> <td>Reference Points</td> <td>Yes</td> <td></td> </tr> </tbody> </table>							Set Name	Used In Rule		Reference Points	Yes	
Set Name	Used In Rule											
Reference Points	Yes											
Add A New Reference Point Set												

- Select the Set Name link to review the set or click Add A New Reference Point Set to add a new set.
- ◆ Private Negotiated Rate Sets:

Note: Please refer to Day 2 Manual: 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						
Back to Travel Rule												
<h2>Rules Airline Rate Sets</h2>												
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> <th></th> </tr> </thead> <tbody> <tr> <td>A20</td> <td>No</td> <td></td> </tr> </tbody> </table>							Set Name	Used In Rule		A20	No	
Set Name	Used In Rule											
A20	No											
Add A New Airline Rate												

- Select the Set Name link to review the set or click Add A New Airline Rate to add a new set.
- 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						
Back to Travel Rule												
<h2>Rules Train Rates Sets</h2>												
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> <th></th> </tr> </thead> <tbody> <tr> <td>Northeast Corridor</td> <td>No</td> <td></td> </tr> </tbody> </table>							Set Name	Used In Rule		Northeast Corridor	No	
Set Name	Used In Rule											
Northeast Corridor	No											
Add A New Train Private Rate Set												

- Select the Set Name link to review the set or click Add A New Train Private Rate Set to add a new set.
- o 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																																			
Back to Travel Rule																																									
<h2>Rules Rental Car/Hotel Discount Code Sets</h2>																																									
<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>kf_car/HOTEL_set</td> <td colspan="5">No</td> <td></td> </tr> <tr> <td>MC_set</td> <td colspan="5">No</td> <td></td> </tr> <tr> <td colspan="7"> Add A New Rental Car Discount Code Set </td> </tr> </tbody> </table>							Rental Car/Hotel Discount Code Sets							Set Name	Used In Rule						kf_car/HOTEL_set	No						MC_set	No						Add A New Rental Car Discount Code Set						
Rental Car/Hotel Discount Code Sets																																									
Set Name	Used In Rule																																								
kf_car/HOTEL_set	No																																								
MC_set	No																																								
Add A New Rental Car Discount Code Set																																									

- Select the Rental Car / Hotel Discount Code Set Name link to review the set or click Add A New Rental Car Discount Code Set to add a new set.
- o 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																												
Back to Travel Rule																																		
<h2>Rules Hotel Private Rate Sets</h2>																																		
<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"> <p>You do not have Sets for Negotiated Rates at this moment</p> </td> </tr> <tr> <td colspan="7"> Add A New Hotel Private Rate Set </td> </tr> </tbody> </table>							Hotel Private Rate Sets							Set Name	Used In Rule						<p>You do not have Sets for Negotiated Rates at this moment</p>							Add A New Hotel Private Rate Set						
Hotel Private Rate Sets																																		
Set Name	Used In Rule																																	
<p>You do not have Sets for Negotiated Rates at this moment</p>																																		
Add A New Hotel Private Rate Set																																		

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

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

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Company Information</h2>						
Companies						
<u>Name</u> ▾		Used in Rule				
Acme Corp		No				
Add A New Company						

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Custom Field Sets</h2>						
Custom Field Sets						
<u>Set Name</u>		Used In Rule		<u>Last Update</u>		Action
Trip Reason		No		August 21, 2007		
Add A New Custom Field Set						

- Select the Custom Field Set Name link to review the set or click Add A New Custom Field Set to add a new set.
- ◆ Enable Car Service with the following options:
 - Configuration: Select the Configuration previously established from the drop down list. If a new configuration is needed or to review an existing set, click the Manage Configurations link to go to the configuration page.
 - The Rules | Configurations page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Configurations</h2>						
Configurations						
Name	Description	Used in Rule				
Car Service		No				
Add A New Configuration						

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Reference Point Sets</h2>						
Reference Point Sets						
Set Name	Used In Rule					
Reference Points	Yes					
Add A New Reference Point Set						

- Select the Reference Point Set Name link to review the set or click Add A New Reference Point Set to add a new set.
- 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 Manage Payment Card Sets link to go to the configuration page.
- The Rules | Corporate Payment Cards Sets page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Travel Rule						
<h2>Rules Corporate Payment Card Sets</h2>						
Corporate Payment Card Sets						
Set Name	Used In Rule	Last Update				
XYZ hotel GTD	No	August 21, 2007				
Add a new payment card set						




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

- 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.
- 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.
- ◆ Enable Airport Parking service with the following options:
 - Configuration: Select the Configuration previously established from the drop down list. If a new configuration is needed or to review an existing set, click the Manage Configurations link to go to the configuration page.
 - The Rules | Configurations page is displayed.

Settings	Users	Services	Groups	Rules	Reports	Profiles												
Back to Travel Rule																		
<h2>Rules Configurations</h2>																		
<table border="1"> <thead> <tr> <th colspan="3">Configurations</th> </tr> <tr> <th>Name</th> <th>Description</th> <th>Used in Rule</th> </tr> </thead> <tbody> <tr> <td>ABC CO_pnf</td> <td></td> <td>No </td> </tr> <tr> <td colspan="3"> Add A New Configuration </td> </tr> </tbody> </table>							Configurations			Name	Description	Used in Rule	ABC CO_pnf		No 	Add A New Configuration		
Configurations																		
Name	Description	Used in Rule																
ABC CO_pnf		No 																
Add A New Configuration																		

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

Settings	Users	Services	Groups	Rules	Reports	Profiles																
Back to Travel Rule																						
<h2>Rules Site Payment Cards Sets</h2>																						
<table border="1"> <thead> <tr> <th colspan="4">Site Payment Cards Sets</th> </tr> <tr> <th>Set Name</th> <th>Used In Rule</th> <th>Last Update</th> <th></th> </tr> </thead> <tbody> <tr> <td>Corp American Express Card</td> <td>No</td> <td>October 25, 2010</td> <td></td> </tr> <tr> <td colspan="4"> Add a new site payment card set </td> </tr> </tbody> </table>							Site Payment Cards Sets				Set Name	Used In Rule	Last Update		Corp American Express Card	No	October 25, 2010		Add a new site payment card set			
Site Payment Cards Sets																						
Set Name	Used In Rule	Last Update																				
Corp American Express Card	No	October 25, 2010																				
Add a new site payment card set																						

- Select the Site Payment Cards Sets | Set Name link to review the set or click Add A New Site Payment Card Set to add a new set.
- Policies: Select the Policy previously configured from the drop down list.
 - To link an existing configuration to the rule, click the Add Policies to List link to go to the list of previously configured policies and make selections. Click the Add Selected button to add that policy to the rule.
 - To Remove Policies from the list, click the policy to select it, and then click the

- 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.

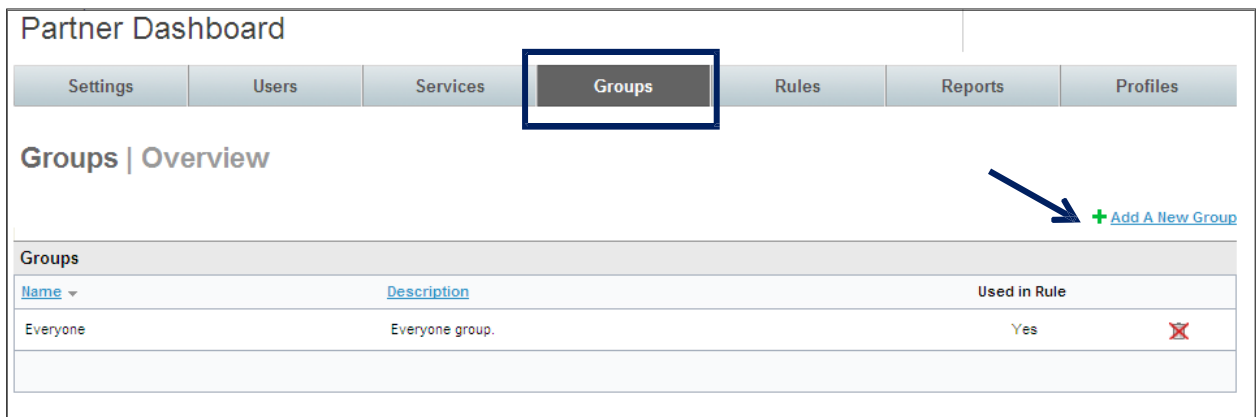
2.2.1 Travel Service Rules for Other Groups of Users

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

2.2.1.1 Defining Groups

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

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



2. The Groups | Add Group page is displayed.

Settings Users Services **Groups** Rules Reports Profiles

[Back to Overview](#)

Groups | Add Group

Group Definition

Group Name: VP

Description: US VIPS

Group Use:

- Service Rules
- Account Rules
- Groupware Rules
- Display Option Rules
- Web Services Rules
- Mobile Rules
- Dynamic Profile Attribute Assignment Rules

Group Parameters

And ...

User Vip indicator Equals Yes [Remove](#)

[Add Parameter](#)

[View Active Users](#) [View All Users](#) [Save](#) [Cancel](#)

3. Complete the page:

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

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

- Description: Enter an optional group description.
- Group Use: Select the Rules where this group will be used.
 - Service Rules: Select this checkbox if the group will be displayed in the list of groups for Service Rules. (We have checked this box for the US VIP Group)
 - Account Rules: Select this checkbox if the group will be displayed in the list of groups for Account Rules.
 - Groupware Rules: Select this checkbox if the group will be displayed in the list of groups for Groupware Rules.
 - Display Options Rules: Select this checkbox if the group will be displayed in the list of groups for Display Options Rules. (We have checked this box for the US VIP Group)
 - Web Services Rules: Select this checkbox if the group will be displayed in the list of groups for Web Services Rules.
 - Mobile Rules: Select this checkbox if the group will be displayed in the list of groups for Mobile Rules.
 - Dynamic Profile Attribute Assignment Rules: Select this checkbox if the group will be displayed in the list of groups for Dynamic Profile Attribute Assignment Rules.
- Group Parameters: Select user criteria to define this group:

- If Group was selected, select an existing Group name from the drop down list
- If User was selected, a list of fields found on the user profile is displayed. Search criteria can include: External ID, User Name / Login, First Name, Middle Name, Last Name, Email, Work Phone, Home Phone, Employee ID, Mobile Phone, Employee
 - Status, Job Title, Job Level, Cost Center, Department Code, Department Name, Division, Business Unit, Company Name, Country Code, Groupware ID, Subdomain Short Name, Number of Credit Cards, Is Guest User, VIP Indicator, Employee Type, Is a Traveler, Dynamic Group Name and MIS 1 – 7.

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

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

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

Group Parameters

And ...

User Vip indicator Equals Yes

Add Parameter

View Active Users View All Users Save Cancel

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

Settings Users Services **Groups** Rules Reports Profiles

[Back to Add Group](#)

Groups | View Group Users

Results for "VIP"

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

Back

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

Settings Users Services **Groups** Rules Reports Profiles

[Back to Add Group](#)

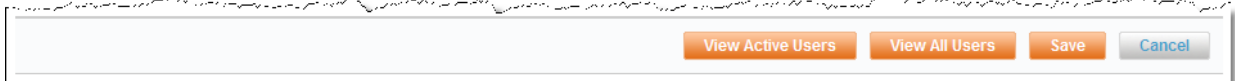
Groups | View Group Users

Results for "VIP"

Name	Email	Address
No users found.		

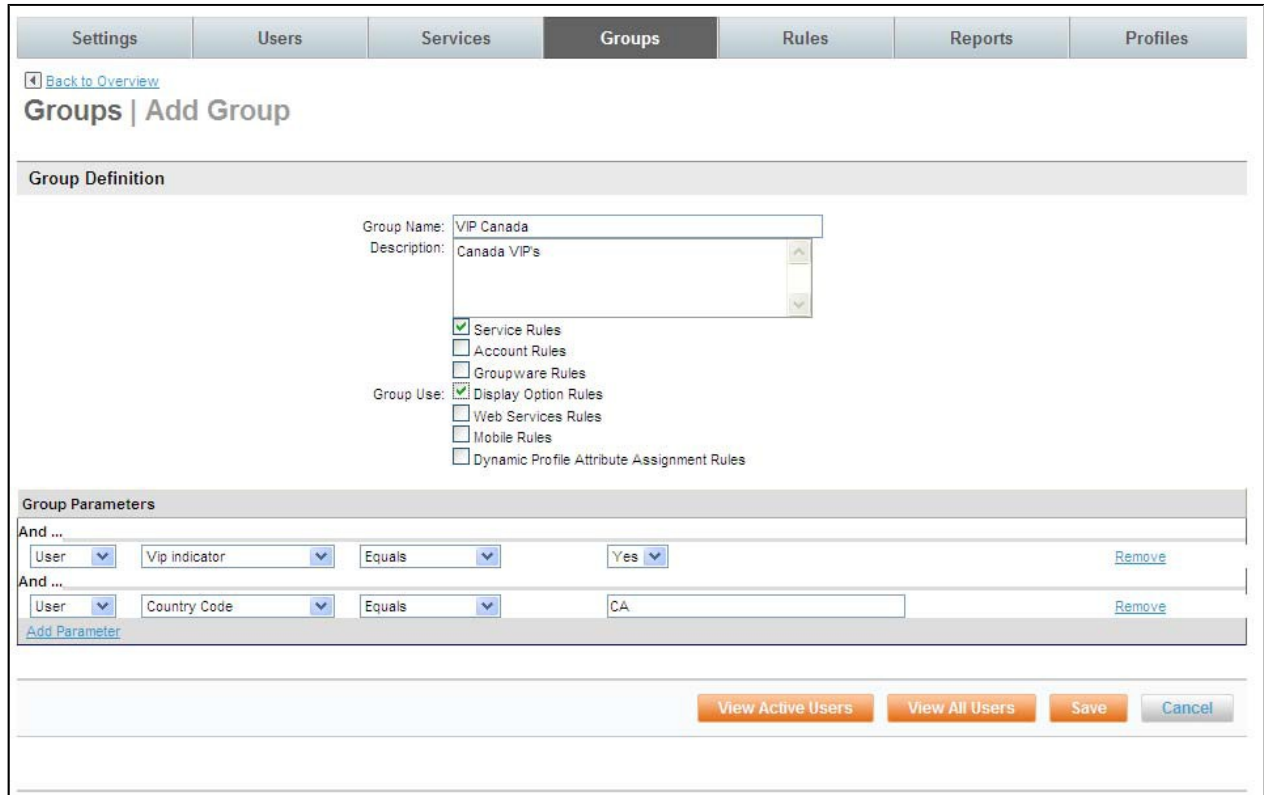
Back

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.



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

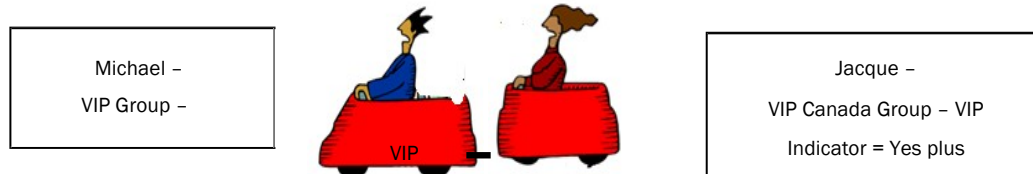
When rules are enforced, the Group selection parameters are engaged to determine the group into which the user falls. The rule for the group closest to the top is processed first. A user can belong to more than one group, but the group highest on the list to which they belong will be the rule that is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

Take a look at how the groups are currently prioritized.

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

[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 Jacques will be selected for the VIP Canada Group.

Settings Users Services Groups **Rules** Reports Profiles

[Back to Overview](#)

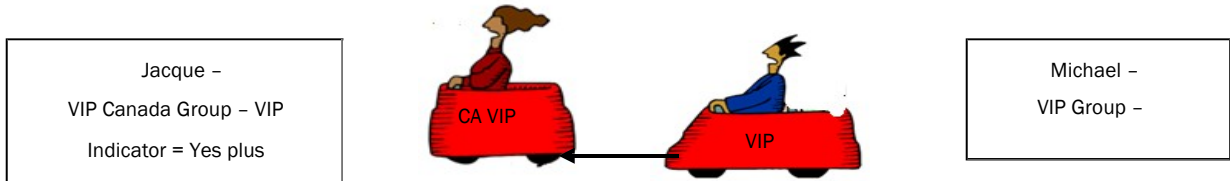
Rules | Service Rules

= Inactive Rules = Active Rules

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	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

Save Priority Changes
Cancel

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



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. The Services | Overview page appears. Then click the **Configurations for Groups Policies** link in the Car Service section.

The screenshot shows the 'Services | Overview' page with a navigation bar containing 'Settings', 'Users', 'Services', 'Groups', 'Rules', 'Reports', and 'Profiles'. The 'Services' tab is active. Below the navigation bar, the page is organized into three columns:

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

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Car Service						
Services Configurations						
Configurations						
<u>Name</u>	<u>Description</u>	<u>Used in Rule</u>				
ABC co rates	preferred rates for abc co.	No				
Deem Network	enabled for EVERYONE	Yes				
Add A New Configuration						

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Configurations						
Services Edit						
Service Configuration						
Configuration Name *		<input type="text" value="Deem Network"/>				
Description		<input type="text" value="enabled for EVERYONE"/>				
Service Options						
Request a Ride Page Message		<input type="text" value="Car Service
We make it fast and easy to reserve car service.

Book car service with the rest of your trip

- Update calendar automatically with reservation details

- Change or cancel reservation with mouse clicks

"/>				
US Providers						

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

3.2.1.1 US Providers

Enable Ground Travel

Company Code * 33447

Corporate Preferred Vendors

Messages Configuration

Select a Car Page Message
Vendor Selection Tips

Suppliers are displayed in order of cost - lowest to highest.

Reserve Your Ride Page Message
reserve your ride page message noted here

Reservation Confirmation Page Message
Gratuity is included in the trip cost. Please do not tip the driver.

Cancellation Page Message
cancellation page message noted here

Reservation Status Page Message
reservation status page message noted here

- o **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.
- o **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.

o 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.

o 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

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

3.2.1.2 UK Providers:

UK Providers
 Enable GroundRez

Corporate Code *

Cost Center

Employee ID

Corporate Preferred Vendors

Messages Configuration

Select a Car Page Message

Reserve Your Ride Page Message

Reservation Confirmation Page Message

Cancellation Page Message

Reservation Status Page Message

- o Enable GroundRez: Select the checkbox to enable car service in the UK.
- o Corporate Code: Enter the code received from the Deem Configuration Team for the Deem preferred provider. This is a required field.
- o Cost Center: Select this checkbox if the traveler's cost center must be transmitted to the car service provider for reporting purposes.
- o Employee ID: Select this checkbox if the traveler's employee ID must be transmitted to the car service provider for reporting purposes.
- o 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.
- o 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.
- o 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:
 - ▣ 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.
 - ▣ US Providers:
 - o Company Code: Enter the code received from Deem as the custom rates vendor code

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

3.2.4 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.

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.

Rules | Service Rules

[Back to Overview](#)

■ = Inactive Rules ■ = Active Rules

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

[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:

Enable Car Service with the following options:

Configuration: Deem Network [Manage Configurations](#)

Reference Points Set: Reference Points 14Apr08 [Manage Reference Points Sets](#)

Payment Card Set: XYZ hotel GTD [Manage Payment Card Sets](#)

Site Payment Card Set: Corp American Express Card [Manage Site Payment Card Sets](#)

Policies: [Add Policies to List](#) [Remove Selected Policies from List](#)

Add Car Service policies

< Add Selected Close

everyone policy

Save

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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.
 - 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.

Deem Support

As the site administrator, you are your organization's contact point with Deem Support for requests and cases. You can use the Support Portal for the following:

- [Reporting an Urgent Issue](#)
- [Logging Into the Support Portal](#)
- [Logging a Case](#)
- [Viewing Cases and Adding Files](#)

Reporting an Urgent Issue

If you need to report an urgent issue, such as a site outage or an emergency involving a service failure that affects all users, and there is no workaround for the problem:

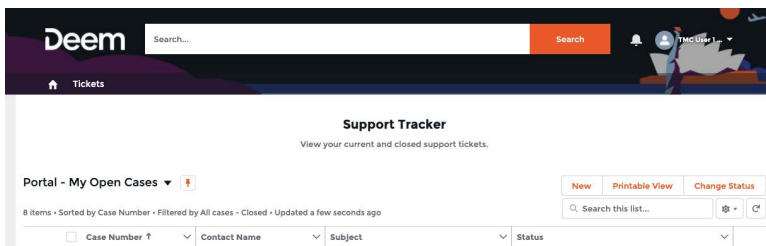
- Enter a support ticket with the priority set to P1 / "Site down/cluster down" via the support portal: URL: <https://deem.force.com/support/s/login>
 - You can leave a message at **1-888-753-2580** (24 hours, 7 days a week); however, **entering a ticket is the preferred method.**
 - If you cannot access the support portal, you can also email our support team: (support@deem.com). Please enter "URGENT" in the subject.

Logging Into the Support Portal

Note: If your organization doesn't have Support Portal usernames and passwords, contact your Deem account representative.

Use the Support Portal to **log a case** (submit issues and requests). Log into the Support Portal (<https://deem.force.com/support/s/login>) with your Support Portal username and password provided by Deem.

This will take you to the Portal's homepage.



To log out of the Support Portal, click the arrow next to your name on the top right corner, and select **Logout** from the dropdown.

Logging a Case

To enter issues or requests into the Support Portal, follow these steps (all fields are required except where noted as optional):

- Click the **New** button on the right of the page. Select the product you are logging the case for - Travel or Ground.

New Case

Select a record type

Travel Support Case

Deem Ground Case

- Click **Next**.
- The Log a Case page appears.

New Case: Travel Support Case

Case Information

Case Owner TMC User 1 Test	Contact Name
Case Number	Case Record Type Travel Support Case

*Status
New
Customers Internal Ticket

Case Information

*Customer Priority
Not reporting an issue, asking for general assistance (question, configuration, etc.)

*Case Reason
Ask a Question
[View all dependencies](#)

Decommission Reason
--None--
[View all dependencies](#)

Decommission- Where did customer move to
--None--
[View all dependencies](#)

Other CBT

Description Information

Ticket Submitted By

Subject

*Description

*Steps to Reproduce Error

[Cancel](#) [Save & New](#) [Save](#)

- The Case Owner, Contact Name, Cast Number and Case Record Type fields are pre-populated with the information associated with your profile:
- Leave the **Status** field set to **New**
- Enter the your Internal Ticket number if you wish to track that in the Case.
- Select the Priority of the Case you are creating
 - a. Site down/Cluster down
 - b. Is restricting the ability to complete at transaction
 - c. Is having an adverse effect on single or multiple users, however is not preventing transactions from being completed
 - d. Not reporting an issue, asking for general assistance (question, configuration, etc.)
- Select a reason from the **Case Reason** dropdown menu as follows:
 - a. Ask a Question
 - b. Report a Problem
 - c. Configuration Request
 - d. Add/Update User
 - e. Decommission Request
 - f. Enhancement
 - g. Groupware Assistance
 - h. HR Feed Assistance
 - i. Log or Report Request
 - j. Notification
 - k. Single Sign On Assistance
 - l. Ghost User
 - m. Other
- If you selected Decommission, you will need to fill in the additional Decommission fields.
 - a. Decommission Reason
 - b. Decommission - Where did the customer move to

- Enter your name in the **Ticket Submitted By** field.
- Enter the Case Subject that provides a summary of what you are experiencing in the **Subject** field.
- Enter a description in the Case Description field, and include the following:
 - a. A more detailed description of the issue.
 - b. site name
 - c. cluster
 - d. username
 - e. customer id
 - f. specific search info
 - g. error/issue
- Enter the specific steps to reproduce the issue in the Steps to Reproduce Error field.
- Click the **Save** button at the bottom to submit the case.
- A preview of the case that you created will be displayed. You can additional comments and Files at the bottom of the page.

Case
Ticket-1750820

[+ Follow](#)
[Clone](#)
[Edit](#)

Status
New

Case Owner
 TMC User 1 Test

Account Name
TMC Test Account

Subject
Gretchen test

DETAILS RELATED

▼ **Case Information**

Case Owner TMC User 1 Test	Contact Name TMC User 1 Test
Case Number Ticket-1750820	Contact Phone 567567567567
Status New	Contact Email cris.olson@deem.com
Date/Time Opened 3/11/2021 9:07 AM	Case Record Type Travel Support Case
Date/Time Closed	
Customers Internal Ticket	

▼ **Case Information**

Customer Priority
Not reporting an issue, asking for general assistance (question, configuration, etc.)

Case Reason
Decommission Request

Decommission Reason
Customer selected another OBT

Decommission- Where did customer move to
Other

Other OBT
Test

▼ **Description Information**

Ticket Submitted By
Gretchen

Subject
Gretchen test

Description
**site name
cluster
user name
customer id
specific search info
error/issue**

Steps to Reproduce Error
**1
2
3
4**

Resolution

Case Comments (0) [New](#)

Files (0) [Add Files](#)

Title	Owner	Last Modified	Size
-------	-------	---------------	------

Viewing Cases and Adding Files

- To view cases, you can use the drop-down on the right-hand side, to choose the status of your desired case. You can also **Pin** the view that you prefer to use.

Recently Viewed Cases ▾

LIST VIEWS

- Portal - All Closed Cases
- Portal - All Open Cases
- Portal - My Closed Cases
- Portal - My Open Cases (Pinned list)
- Recently Viewed
- ✓ Recently Viewed Cases

- You can also use the **Search this list** field to search for a keyword of your desired case.

Recently Viewed Cases ▾

9 items • Sorted by Case Number • Filtered by Recently Viewed • Updated 6 minutes ago


New Printable View Change Status

Search this list...

- Click the **Case Number**, to view the details of the case, add comments, or files.
- Use the **Related** tab, to view comments, emails, history and files:

DETAILS **RELATED**

Case Comments (1) New

User	Public	Created Date	Comment
 TMC Manager Test	<input checked="" type="checkbox"/>	3/3/2021 12:06 PM	hfello nio comment

[View All](#)

Emails (1)

Subject	From Address	To Address	Message Date
Ticket-1747707 - T...	cnotify@deem.com	cris.olson@deem.co...	1/7/2021 9:46 AM

[View All](#)

Case History (1)

Date	Field	User	Original Value	New Value
1/7/2021 9:46 ...	Created.	TMC Manager ...		

[View All](#)

Files (0) Add Files

[Upload Files](#)

- To add a comment: Click the **New** button:

Case Comments (0) New

- After you add your comment, click **Save**.
 - Note:** You do not need to check the boxes below the comment box, but you can if you like. Either way, Support will see your comment and receive a notification that you have updated the case.
- To add an attachment: Scroll down to the Files section of the page and click the **Add Files** button, and follow the steps. You can either click the **Upload Files** button, or you can Drag and Drop the file that you would like to attach:

Files (0) Add Files

[Upload Files](#)

Or drop files