



# Deem Travel: Partner Dashboard Training

Day 3 –

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

Nov 2020

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# 1 Managing the Site Tabs – The Services Tab

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

## 1.1 Custom Fields

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

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

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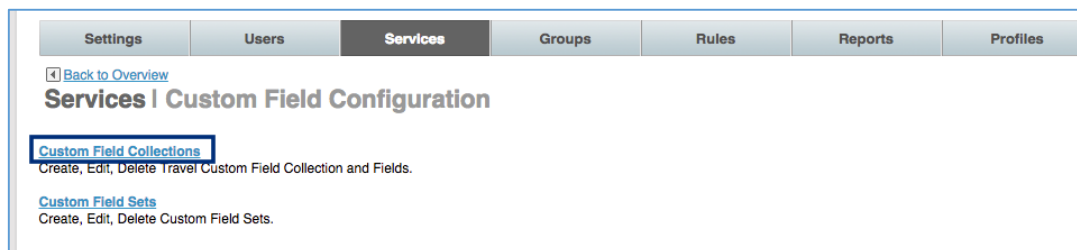
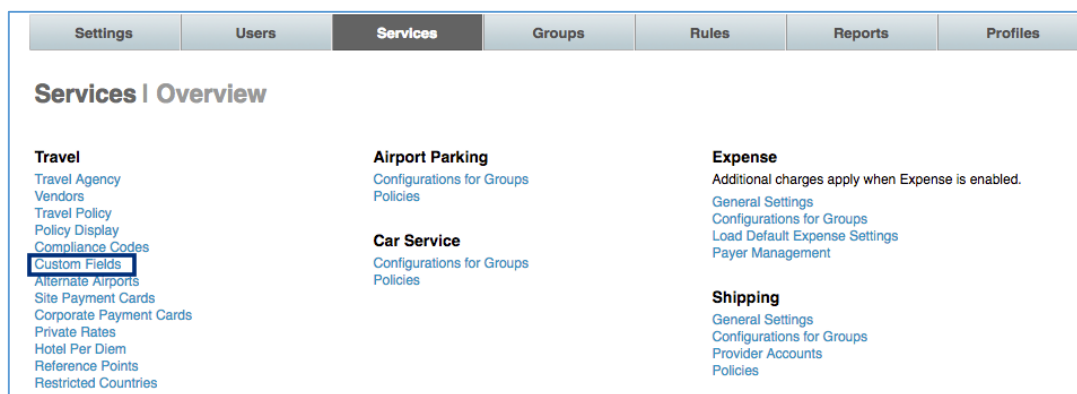
Note: Custom fields are not reportable in our standard reports.

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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.



2. 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.

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Custom Field Configuration</a>						
<b>Services   Custom Field Collections</b>						
<b>Custom Field Collections</b>						
Collection Name	Last Update	Action				
<a href="#">reportinginfo</a>	August 12, 2008	<a href="#">Edit</a>	<a href="#">✕</a>			
<a href="#">agencyinfo</a>	August 12, 2008	<a href="#">Edit</a>	<a href="#">✕</a>			
<a href="#">TripPurpose</a>	June 09, 2009	<a href="#">Edit</a>	<a href="#">✕</a>			
<a href="#">Add A New Collection</a>						

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)

Text

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**

Default:  checked  unchecked

**Check Box**

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

**Field Type Preference**

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

Option Labels and Values:  
Meet with Clients  
Training Class

List (single-select)

Sort labels alphabetically

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

[Advanced](#)

Save Cancel

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

An example of this would be the Employee Type.

Employee Type\*

Employee (Please select)

Employee

Guest

Temp

Save

- 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"/>	<a href="#">TripPurpose</a>	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.



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
<a href="#">DefaultCustomSet</a>	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"/>	<a href="#">agencyinfo</a>
<input type="checkbox"/>	<a href="#">reportinginfo</a>
<input checked="" type="checkbox"/>	<a href="#">TripPurpose</a>

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"/>	<a href="#">TripPurpose</a>	June 09, 2009	<a href="#">Edit</a> <a href="#">Delete</a>

[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.

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

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### 1.2.1 Vendor Management List Items

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

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

[Add A New Airline Preference](#)

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Airline Preferences](#)

## Services | Add

**General Settings**

Activate Preference

Name:

Preference Start Date:  -  -

Preference End Date:  -  -

**Location Preferences**

Apply globally (regardless of location)

Apply to specific locations (set locations below)

**Preferred Airlines**

Most Preferred Airlines:

Highly Preferred Airlines:

Preferred Airlines:

Flag the Preferred Airlines as Preferred?:  Yes  No

**Restricted Airlines**

Airlines to be excluded:

Airlines to be displayed last:

Airlines to be displayed after similar airlines:

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

Remove logo of restricted airlines:  Yes  No

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

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

**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:

**Preferred Airlines**

Most Preferred Airlines:

Highly Preferred Airlines:

Preferred Airlines:

Flag the Preferred Airlines as Preferred?:  Yes  No

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

**Restricted Airlines**

Airlines to be excluded:

Airlines to be displayed last:

Airlines to be displayed after similar airlines:

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

Remove logo of restricted airlines:  Yes  No

- ◆ Restricted Airlines:
  - Airlines to be excluded: Enter the airline codes whose search results will not be displayed regardless if they meet trip search criteria. 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.

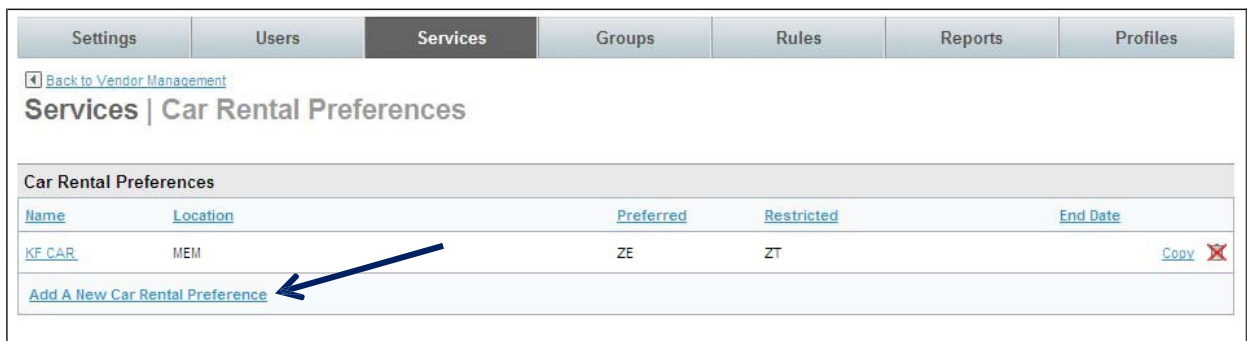
### 1.2.1.2 Car Rental Preferences

1. Click the Car Rental Preferences link.




The screenshot shows a navigation menu with tabs: Settings, Users, Services (selected), Groups, Rules, Reports, and Profiles. Below the menu, there is a breadcrumb link 'Back to Travel Configuration' and the page title 'Services | Vendor Management'. Under the heading 'Vendor Preferences', there are four links: 'Airline Preferences', 'Car Rental Preferences' (highlighted with a blue arrow), 'Hotel Chain Preferences', and 'Vendor Preference Sets'. Under 'Vendor Preference Sets', there are three links: 'Airline Preference Sets', 'Car Rental Preference Sets', and 'Hotel Chain Preference Sets'.

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



The screenshot shows the 'Services | Car Rental Preferences' page. The 'Services' tab is selected. There is a breadcrumb link 'Back to Vendor Management' and the page title 'Services | Car Rental Preferences'. Below the title, there is a section header 'Car Rental Preferences' and a table with the following data:

Name	Location	Preferred	Restricted	End Date
<a href="#">KF CAR</a>	MEM	ZE	ZT	<a href="#">Copy</a> 

Below the table, there is a link 'Add A New Car Rental Preference' highlighted with a blue arrow.

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Car Rental Preferences](#)

## Services | Add

### General Settings

Activate Preference

Name:

Preference Start Date: - - -

Preference End Date: - - -

### Location Preferences

Apply globally (regardless of location)

Apply to specific locations (set locations below)

### Preferred Car Rental Companies

Most Preferred Car Rental Companies:  Location Code:

Highly Preferred Car Rental Companies:  Location Code:

Preferred Car Rental Companies:  Location Code:

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

### Restricted Car Rental Companies

Car Rental Companies to be excluded:

Car Rental Companies to be displayed last:

Car Rental Companies to be displayed after similar car rental companies:

Remove logo of restricted car rental companies:  Yes  No

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

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

**Location Preferences**

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

Separate multiple airport codes or city names with semicolons.

Location:  by airport codes  by states  by countries  anywhere

[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.

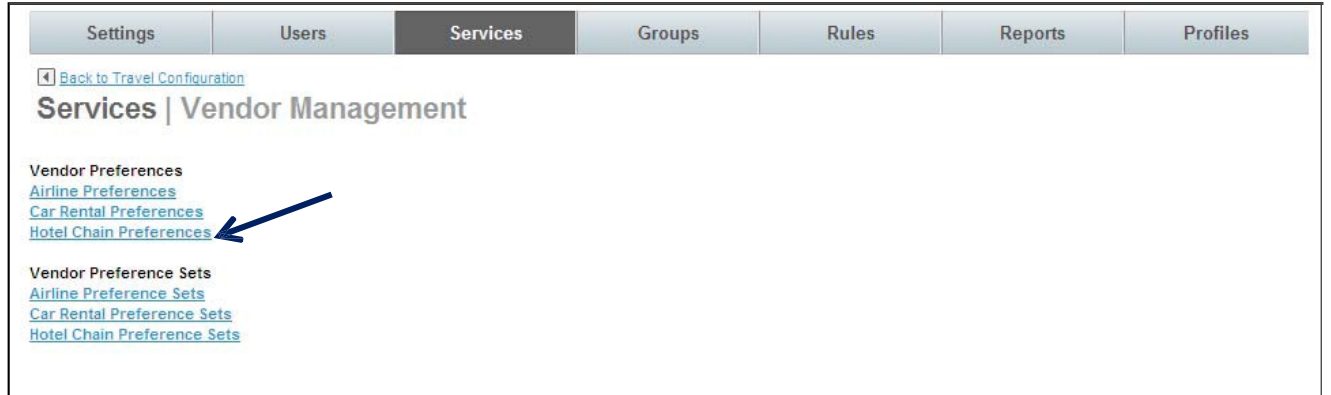
---

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

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

Settings	Users	Services	Groups	Rules
<a href="#">Back to Hotel Chain Preferences</a>				
<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 label 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 label 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.

- 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

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Vendor Management](#)

### Services | Hotel Chain Preference Sets

Hotel Chain Preference Sets

Preference Set Name	Used In Rule	
<a href="#">hk</a>	No	
<a href="#">Sacramento</a>	No	
<a href="#">H/C Hotel</a>	No	
<a href="#">Add A New Hotel Chain Preference Set</a>		

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

Settings Users **Services** Groups Rules Reports Profiles

[Back to Hotel Chain Preference Sets](#)

### Services | Add

Hotel Chain Preference Set

Preference Set Name:

Hotel Chain Preferences

Name	Location	Preferred	Restricted	End Date
You do not have a Hotel Chain Preference defined in this set				

- ◆ 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"/>	<a href="#">ABC Hotels</a>	Los Angeles, CA, US; New York, NY, US; San Francisco, CA, US	HY, HH, MC	SI, KI	
<input type="radio"/>	<a href="#">Sacramental Hotels</a>	Sacramento, CA, US	RD, HY, SI	GI	
<input type="radio"/>	<a href="#">Foster City Hotels</a>	Foster City, CA, US	CP, MC, HH	HI	

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.

---



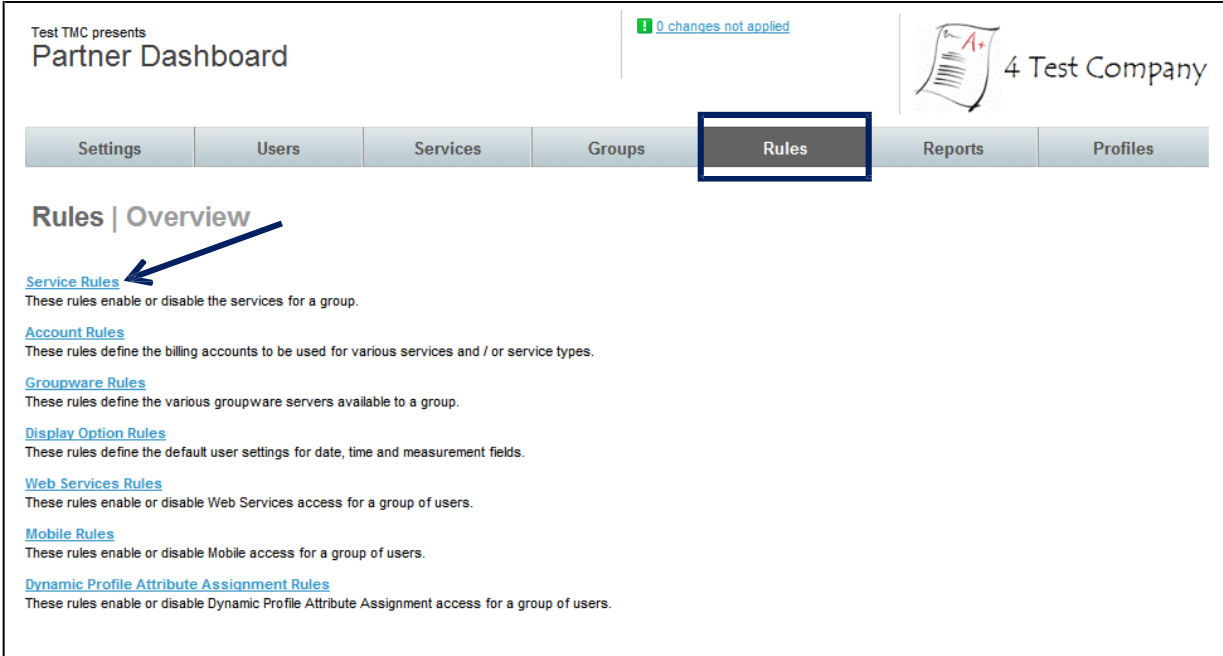
## 2.1 Rules Tab

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.

Settings	Users	Services	Groups	Rules	Reports	Profiles				
<a href="#">Back to Overview</a>										
<b>Rules   Service Rules</b>										
= Inactive Rules   = Active Rules										
Priority	Group	Dining	Conferencing	Corporate Admin Portal	Shipping	Expenses (New)	Expensewire (Discontinued)	Travel	Shopping	
	Everyone	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	
							<a href="#">Save Priority Changes</a>	<a href="#">Cancel</a>		

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

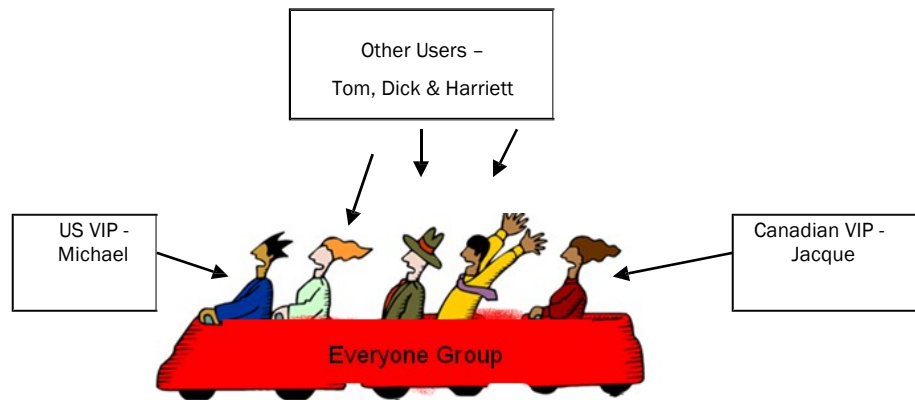
To enable Travel Rules, first determine if all users will use the same rules or if there are different rules for different groups of travelers or users. If everyone will follow the same rules, only add Travel Service Rules to the Everyone Group.

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

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

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

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

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

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Travel Rule</a>						
<b>Rules   Hotel Chain Preference Sets</b>						
<b>Hotel Chain Preference Sets</b>						
<a href="#">Preference Set Name</a>	Used In Association					
<a href="#">hk</a>	Yes					
<a href="#">Sacramento</a>	No					
<a href="#">IHC Hotel</a>	No					
<a href="#">Add A New Hotel Chain Preference Set</a>						

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Travel Rule</a>						
<b>Rules   Restricted Countries Configuration Sets</b>						
<b>Restricted Countries Configuration Sets</b>						
Set Name	Used In Rule				Last Update	
You do not have any Restricted Countries Configuration Sets defined						
<a href="#">Add Restricted Countries Configuration Set</a>						

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




---

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

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

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

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

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

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

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

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

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

- Select the Setting Name link to review the set or click Add A New Agency Setting to add a new set.
- ◆ 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Alternate Airport Sets</h2>						
<b>Alternate Airport Sets</b>						
<a href="#">Set Name</a> ▾	Used In Rule	Last Update				
<a href="#">Charlotte Based</a>	Yes	May 15, 2009				
<a href="#">Sacramento</a>	Yes	March 03, 2008				
<a href="#">TPA-BOS</a>	No	March 03, 2008				
<a href="#">VA</a>	Yes	March 03, 2008				
<a href="#">Add A New Alternate Airport Code Set</a>						

- Select the Set Name link to review the set or click Add A New Alternate Airport Code Set to add a new set.
- ◆ 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Display Configuration Sets</h2>						
<b>Display Configuration Sets</b>						
Set Name ▾		Used In Rule	Last Update			
<a href="#">Guest Travel</a>		No	August 22, 2007			
<a href="#">Everyone</a>		No	August 21, 2007			
<a href="#">Add A New Display Configuration Set</a>						

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

- Select the 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Site Payment Cards Sets</h2>						
<h3>Site Payment Cards Sets</h3>						
<a href="#">Set Name</a> ▾		Used In Rule	<a href="#">Last Update</a>			
<a href="#">Corp American Express Card</a>		No	October 25, 2010			
<a href="#">Add a new site payment card set</a>						

- Select the 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Hotel Per Diem Sets</h2>						
<h3>Hotel Per Diem Sets</h3>						
<a href="#">Set Name</a> ▾		Used In Rule	<a href="#">Last Update</a>			
<a href="#">MCO</a>		No	May 15, 2009			
<a href="#">Add A New Hotel Per Diem Set</a>						

- 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)

<b>Reference Points</b>	
Reference Points Set:	Reference Points 14Apr08 <a href="#">Add/Edit Reference Points Sets</a>
<b>Private Negotiated Rate Sets</b>	
Airline Rate Set:	Airline Rate Set <a href="#">Add/Edit Airline Rate Sets</a>
Train Private Rate Set:	Train Set <a href="#">Add/Edit Train Rate Sets</a>
Rental Car/Hotel Discount Code Set:	Car and Hotel Rates <a href="#">Add/Edit Rental Car/Hotel Discount Code Sets</a>
Hotel Private Rate Set:	None <a href="#">Add/Edit Hotel Private Rate Sets</a>
<b>Company Information</b>	
Company:	Acme Corp <a href="#">Add/Edit Company Info</a>
<b>Custom Fields</b>	
Custom Field Set:	DefaultCustomSet <a href="#">Add/Edit Custom Fields Set</a>
<input type="checkbox"/> Enable Airport Parking with the following options:	
Configuration:	ABC CO.everyone <a href="#">Manage Configurations</a>
Site Payment Card Set:	None <a href="#">Manage Site Payment Card Sets</a>
Policies:	<a href="#">Add Policies to List</a> <a href="#">Remove Selected Policies from List</a> <a href="#">Manage All Policies</a>
<input type="checkbox"/> Enable Car Service with the following options:	
Configuration:	Deem Network <a href="#">Manage Configurations</a>
Reference Points Set:	None <a href="#">Manage Reference Points Sets</a>
Payment Card Set:	None <a href="#">Manage Payment Card Sets</a>
Site Payment Card Set:	None <a href="#">Manage Site Payment Card Sets</a>
Policies:	<a href="#">Add Policies to List</a> <a href="#">Remove Selected Policies from List</a> <a href="#">Manage All Policies</a>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

◆ 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									
<a href="#">Back to Travel Rule</a>															
<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><a href="#">Reference Points</a></td> <td>Yes</td> <td></td> </tr> <tr> <td colspan="3"> <a href="#">Add A New Reference Point Set</a> </td> </tr> </tbody> </table>							Set Name	Used In Rule		<a href="#">Reference Points</a>	Yes		<a href="#">Add A New Reference Point Set</a>		
Set Name	Used In Rule														
<a href="#">Reference Points</a>	Yes														
<a href="#">Add A New Reference Point Set</a>															

- Select the Set Name link to review the set or click Add A New Reference Point Set to add a new set.
- ◆ 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									
<a href="#">Back to Travel Rule</a>															
<h2>Rules   Airline Rate Sets</h2>															
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> <th></th> </tr> </thead> <tbody> <tr> <td><a href="#">A20</a></td> <td>No</td> <td></td> </tr> <tr> <td colspan="3"> <a href="#">Add A New Airline Rate</a> </td> </tr> </tbody> </table>							Set Name	Used In Rule		<a href="#">A20</a>	No		<a href="#">Add A New Airline Rate</a>		
Set Name	Used In Rule														
<a href="#">A20</a>	No														
<a href="#">Add A New Airline Rate</a>															

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

Settings	Users	Services	Groups	Rules	Reports	Profiles									
<a href="#">Back to Travel Rule</a>															
<h2>Rules   Train Rates Sets</h2>															
<table border="1"> <thead> <tr> <th>Set Name</th> <th>Used In Rule</th> <th></th> </tr> </thead> <tbody> <tr> <td><a href="#">Northeast Corridor</a></td> <td>No</td> <td></td> </tr> <tr> <td colspan="3"> <a href="#">Add A New Train Private Rate Set</a> </td> </tr> </tbody> </table>							Set Name	Used In Rule		<a href="#">Northeast Corridor</a>	No		<a href="#">Add A New Train Private Rate Set</a>		
Set Name	Used In Rule														
<a href="#">Northeast Corridor</a>	No														
<a href="#">Add A New Train Private Rate Set</a>															



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

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

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

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

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

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

- Select the Company Information link to review the set or click Add A New Company to add a new set.
- ◆ 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Custom Field Sets</h2>						
<b>Custom Field Sets</b>						
<u>Set Name</u>	<u>Used In Rule</u>	<u>Last Update</u>	<u>Action</u>			
<a href="#">Trip Reason</a>	No	August 21, 2007				
<a href="#">Add A New Custom Field Set</a>						

- Select the Custom Field Set Name link to review the set or click Add A New Custom Field Set to add a new set.
- ◆ 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Configurations</h2>						
<b>Configurations</b>						
Name	Description	Used in Rule				
<a href="#">Car Service</a>		No				
<a href="#">Add A New Configuration</a>						

- Select the Configuration Name link to review the set or click Add A New Configuration to add a new set.
- 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Reference Point Sets</h2>						
<b>Reference Point Sets</b>						
Set Name	Used In Rule					
<a href="#">Reference Points</a>	Yes					
<a href="#">Add A New Reference Point Set</a>						

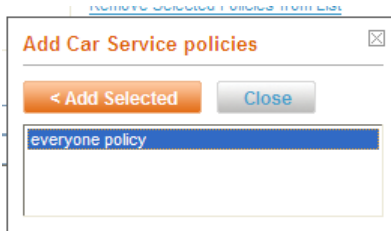
- Select the Reference Point Set Name link to review the set or click Add A New Reference Point Set to add a new set.
- o Payment Card Set: Select the Payment Card Set previously configured from the drop down list. If a new configuration is needed or to review an existing set, click the Manage Payment 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
<a href="#">Back to Travel Rule</a>						
<h2>Rules   Corporate Payment Card Sets</h2>						
<b>Corporate Payment Card Sets</b>						
Set Name	Used In Rule	Last Update				
<a href="#">XYZ hotel GTD</a>	No	August 21, 2007				
<a href="#">Add a new payment card set</a>						

- Select the Corporate Payment Cards Set Name link to review the set or click Add A New Payment Card Set to add a new set.
- 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												
<a href="#">Back to Travel Rule</a>																		
<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><a href="#">ABC CO_pnf</a></td> <td></td> <td>No </td> </tr> <tr> <td colspan="3"> <a href="#">Add A New Configuration</a> </td> </tr> </tbody> </table>							Configurations			Name	Description	Used in Rule	<a href="#">ABC CO_pnf</a>		No 	<a href="#">Add A New Configuration</a>		
Configurations																		
Name	Description	Used in Rule																
<a href="#">ABC CO_pnf</a>		No 																
<a href="#">Add A New Configuration</a>																		

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

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

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

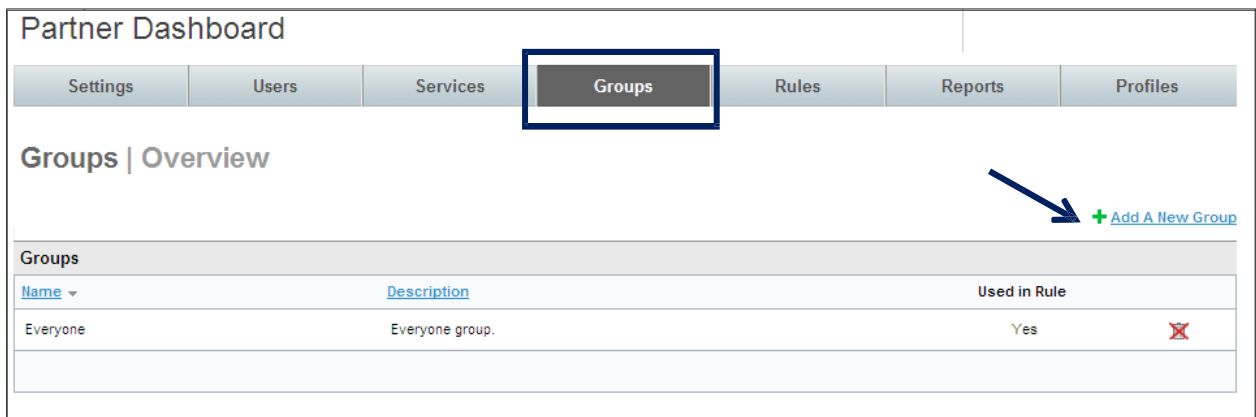
### 2.2.1 Travel Service Rules for Other Groups of Users

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.

The screenshot shows a 'Group Parameters' configuration window. At the top, it says 'And ...'. Below that, there are four dropdown menus: 'User', 'Vip indicator', 'Equals', and 'Yes'. To the right of the 'Yes' dropdown is a 'Remove' link. Below the dropdowns is an 'Add Parameter' link. At the bottom of the window, there are four buttons: 'View Active Users' (highlighted in orange), 'View All Users', 'Save', and '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.

The screenshot shows the 'Groups | View Group Users' page. At the top, there are navigation tabs: Settings, Users, Services, Groups (selected), Rules, Reports, and Profiles. Below the tabs is a 'Back to Add Group' link. The main heading is 'Groups | View Group Users'. Below that, it says 'Results for "VIP"'. There is a table with the following data:

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

A blue arrow points to the name 'Michael Jordan'. At the bottom right, there is a 'Back' button.

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.

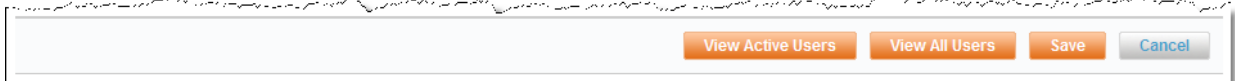
The screenshot shows the 'Groups | View Group Users' page with the same navigation tabs as the previous screenshot. Below the tabs is a 'Back to Add Group' link. The main heading is 'Groups | View Group Users'. Below that, it says 'Results for "VIP"'. There is a table with the following data:

Name	Email	Address
No users found.		

At the bottom right, there is a 'Back' button.



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.

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

9. Be sure to use both the VIP Indicator and the Country Code as group Parameters when creating the Canadian VIP group to differentiate it from the US VIP group. Click Save.

10. The Groups | Overview page is re-displayed with the new group.

11. Click the **Changes not applied** link to commit changes. Commit the changes.

---

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

---

## 2.3 Applying Rules for Other Groups of Users

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

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

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

### 2.3.1 Working with Rule Priorities

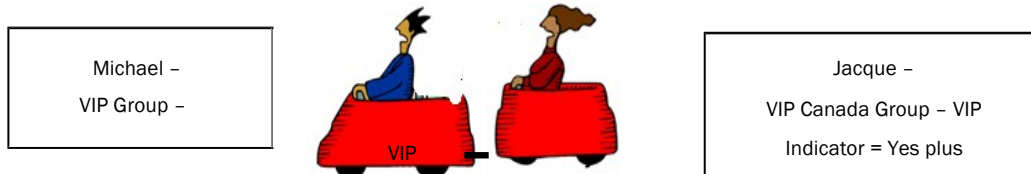
When rules are enforced, the Group selection parameters are engaged to determine the group into which the user falls. The rule for the group closest to the top is processed first. A user can belong to more than one group, but the group highest on the list to which they belong will be the rule that is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

Take a look at how the groups are currently prioritized.

Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Shopping
10	<a href="#">Corporate Manager</a>	<b>Edit</b>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>
20	<a href="#">Executive VP US</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<b>Edit</b>	<b>Edit</b>	<b>Edit</b>
30	<a href="#">Executive VP in Canada</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<b>Edit</b>	<b>Edit</b>	<b>Edit</b>
	Everyone	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<b>Edit</b>	<b>Edit</b>	<b>Edit</b>	<a href="#">Add</a>

[Save Priority Changes](#) [Cancel](#)

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



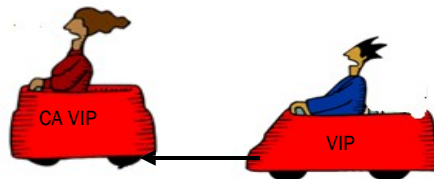
The VIP US Group is higher than VIP Canada Group therefore the VIP US Group's selection parameters will be taken into consideration first to select users who meet the Group criteria. In our example, both Michael and Jacque have the VIP Indicator set to "Yes" as the selection parameter, therefore both 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		
<a href="#">Back to Overview</a> <b>Rules   Service Rules</b> <span style="color: yellow;">■</span> = Inactive Rules <span style="color: green;">■</span> = Active Rules								
Priority	Group	Corporate Admin Portal	Shipping	Expenses	Conferencing	Dining	Travel	Shopping
10	<a href="#">Corporate Manager</a>	Edit	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>
20	<a href="#">Executive VP in Canada</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	Edit	Edit	Edit
30	<a href="#">Executive VP US</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	Edit	Edit	Edit
	Everyone	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>	Edit	Edit	Edit	<a href="#">Add</a>
							<input type="button" value="Save Priority Changes"/> <input type="button" value="Cancel"/>	

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

Jacque -  
 VIP Canada Group - VIP  
 Indicator = Yes plus



Michael -  
 VIP Group -

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

## 3 Marketplace Services

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

- Airport Parking
- Car Service

---

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

---

### 3.1 Airport Parking

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

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

#### 3.1.1 Airport Parking Configuration

1. Click the **Services** tab. The Services | Overview page appears. Then click the **Configurations for Groups Policies** link in the Airport Parking section.

The screenshot shows the Deem dashboard's 'Services | Overview' page. At the top, there is a navigation bar with tabs for Settings, Users, Services (which is active), Groups, Rules, Reports, and Profiles. Below the navigation bar, the page is titled 'Services | Overview' and is organized into three columns:

- Travel**: A list of links including 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, and Restricted Countries.
- Airport Parking**: A section with a blue box highlighting the 'Configurations for Groups Policies' link. Below it is the 'Car Service' section with a link to 'Configurations for Groups Policies'.
- Expense**: A section with the text 'Additional charges apply when Expense is enabled.' and links for General Settings, Configurations for Groups, Load Default Expense Settings, and Payer Management.

Below the Expense section is the 'Shipping' section with links for General Settings, Configurations for Groups, Provider Accounts, and Policies.

2. The Services | Configurations page is displayed. 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.

Name	Description	Used in Rule
<a href="#">ABC CO everyone</a>	used by all employees	No
<a href="#">Group 2</a>	Group 2	Yes

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

📄 Service Configuration:

Configuration Name \*

Description

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

## Service Options:

Service Options
<b>Search Page Message</b>
<p>&lt;P&gt;&lt;B&gt;The easy way&lt;/B&gt; to save time. Park at an off-airport location and take a convenient shuttle to the terminal. On your return, shuttles depart the terminal every three to five minutes.&lt;/P&gt;&lt;br/&gt;&lt;P&gt;&lt;B&gt;The safest way&lt;/B&gt; to the airport and back. Parking lots are gated and well-lit. &lt;/P&gt;&lt;br/&gt;&lt;P&gt;&lt;B&gt;The friendly way&lt;/B&gt; to get to your gate. Additional services include luggage assistance, help with dead batteries, and car washes.&lt;/P&gt;&lt;br/&gt;&lt;P&gt;NOTE:&lt;BR&gt;&lt;BR&gt; No coupons, promotions or special rates can be combined with online rates.&lt;BR&gt; Drop-off and Pick-up times should be the time you want to arrive at the lot, not your flight time.&lt;BR&gt; Advance booking requirements may vary by location.&lt;/P&gt;</p>
<b>Results Page Message</b>
Select one of the results or modify your search using the tools above.
<b>Confirmation Page Message</b>
Your printed copy of your reservation is used two ways. When you arrive at the facility it can be used to guarantee you a parking space. When you exit the facility, the cashier will attach it to your ticket as proof of payment.<P>Having only your confirmation number is not proof of purchase. Without this voucher, you must pay the cashier the full amount when exiting the facility. Facility staff are unable to access your on-line booking and cannot verify your purchase without your printed reservation.</P>
<b>Cancel Page Message</b>
<b>Change Page Message</b>

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

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

Enable Park N'Fly

IATA Code

Cancellation Policy

Cancellations are permitted until 12 hours prior to expected arrival time.

Change Policy

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

Enable Purple Parking

Source Code \*

This configuration is used by these groups:

- o IATA Code: Enter the agency's IATA code. One code will be issued per TMC or direct customer and can be the same number for use on all cloned sites.
  - o Cancellation Policy: Enter the message using plain text to be displayed under the rules and restrictions section of the purchase page as well as on the confirmation email sent to the traveler as the service cancellation policy.
  - o Change Policy: Enter the message using plain text to be displayed under the rules and restrictions section of the purchase page as well as on the confirmation email sent to the traveler as the service change policy.
- Enable Purple Parking: Select the checkbox to enable the airport parking service using Purple Parking and its affiliates. Purple Parking is available in the UK only.
    - o Source Code: Enter the corporate discount code provided to Deem by Purple Parking.
5. Click Save to save the configuration. Click the Back to Airport Parking link to return to the Services | Airport Parking page.

### 3.1.3 Airport Parking Rules

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

To add the service to Rules:

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

Settings Users Services Groups **Rules** Reports Profiles

## Rules | Overview

[Service Rules](#)  
These rules enable or disable the services for a group.

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

[Groupware Rules](#)  
These rules define the various groupware servers available to a group.

[Display Option Rules](#)  
These rules define the default user settings for date, time and measurement fields.

[Web Services Rules](#)  
These rules enable or disable Web Services access for a group of users.

[Mobile Rules](#)  
These rules enable or disable Mobile access for a group of users.

[Dynamic Profile Attribute Assignment Rules](#)  
These rules enable or disable Dynamic Profile Attribute Assignment access for a group of users.

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

Partner Dashboard

Settings Users Services Groups **Rules** Reports Profiles

[Back to Overview](#)

## Rules | Service Rules

= Inactive Rules
  = Active Rules

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



3. The Rules | Travel Rule page is displayed.

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

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

## 3.2 Car Service

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

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

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

---

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

---

### 3.2.1 Deem Preferred Network Configuration

To configure a Deem Preferred Network:

1. Click the **Services** tab. 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** (highlighted with a blue box)
- 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
<a href="#">Back to Car Service</a>						
<b>Services   Configurations</b>						
<b>Configurations</b>						
<b>Name</b> ▾	<b>Description</b>	<b>Used in Rule</b>				
<a href="#">ABC co rates</a>	preferred rates for abc co.	No				
<a href="#">Deem Network</a>	enabled for EVERYONE	Yes				
<a href="#">Add A New Configuration</a>						

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
<a href="#">Back to Configurations</a>						
<b>Services   Edit</b>						
<b>Service Configuration</b>						
Configuration Name *	<input type="text" value="Deem Network"/>					
Description	<input type="text" value="enabled for EVERYONE"/>					
<b>Service Options</b>						
Request a Ride Page Message	<input type="text" value="&lt;B&gt;Car Service&lt;/B&gt;&lt;BR&gt;We make it fast and easy to reserve car service.&lt;BR&gt;&lt;BR&gt;Book car service with the rest of your trip &lt;BR&gt;&lt;BR&gt;- Update calendar automatically with reservation details&lt;BR&gt;&lt;BR&gt;&lt;BR&gt;&lt;BR&gt;- Change or cancel reservation with mouse clicks&lt;BR&gt;&lt;BR&gt;"/>					
<b>US Providers</b>						

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

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

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

Cancellation Page Message  
cancellation page message noted here

Reservation Status Page Message  
reservation status page message noted here

- 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.

Settings Users Services Groups **Rules** Reports Profiles

## Rules | Overview

[Service Rules](#)  
These rules enable or disable the services for a group.

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

[Groupware Rules](#)  
These rules define the various groupware servers available to a group.

[Display Option Rules](#)  
These rules define the default user settings for date, time and measurement fields.

[Web Services Rules](#)  
These rules enable or disable Web Services access for a group of users.

[Mobile Rules](#)  
These rules enable or disable Mobile access for a group of users.

[Dynamic Profile Attribute Assignment Rules](#)  
These rules enable or disable Dynamic Profile Attribute Assignment access for a group of users.

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

Settings Users Services Groups **Rules** Reports Profiles

[Back to Overview](#)

## Rules | Service Rules

= Inactive Rules  = Active Rules

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

[Save Priority Changes](#) [Cancel](#)

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

Settings Users Services Groups Rules Reports Profiles

[Back to Service Rules](#)

## Rules | Travel Rule

**Rule Definition**

Description:   Activate Rule [Remove Rule](#)

**IF...**  
Group: Everyone

**THEN...**

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

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.

## 4 Support Case Entry

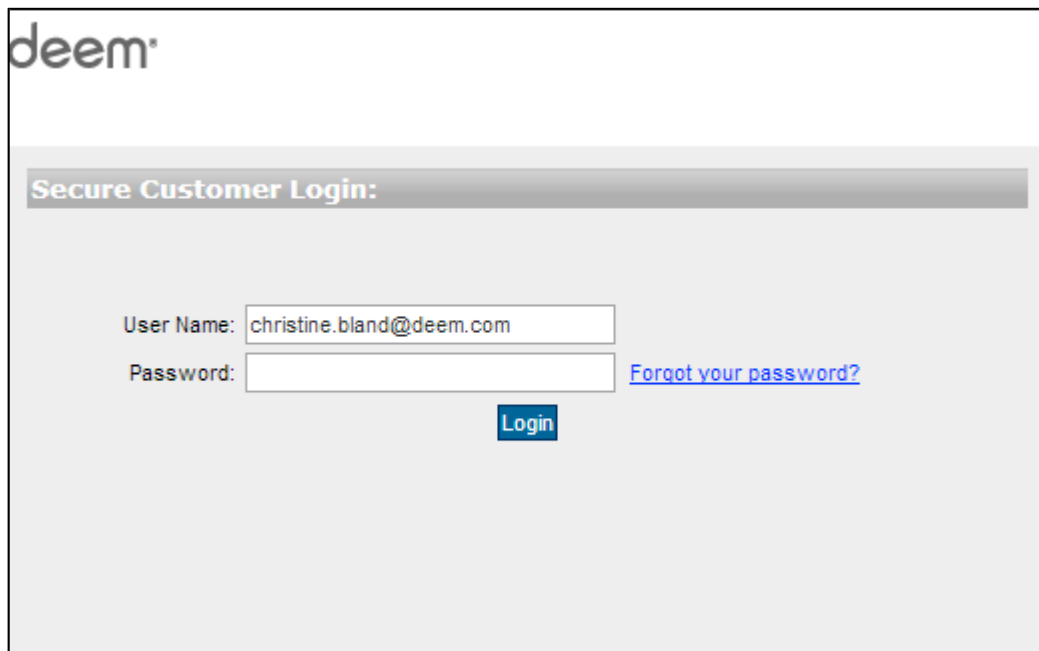
Support Cases are entered for many different reasons. They may be the result of testing that doesn't go exactly as you hoped, or they can contain questions. In this section we will cover how to enter a Support Case that effectively identifies your issue.

### 4.1 Reporting an Urgent Issue

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

### 4.2 Entering a Support Case for All Issues

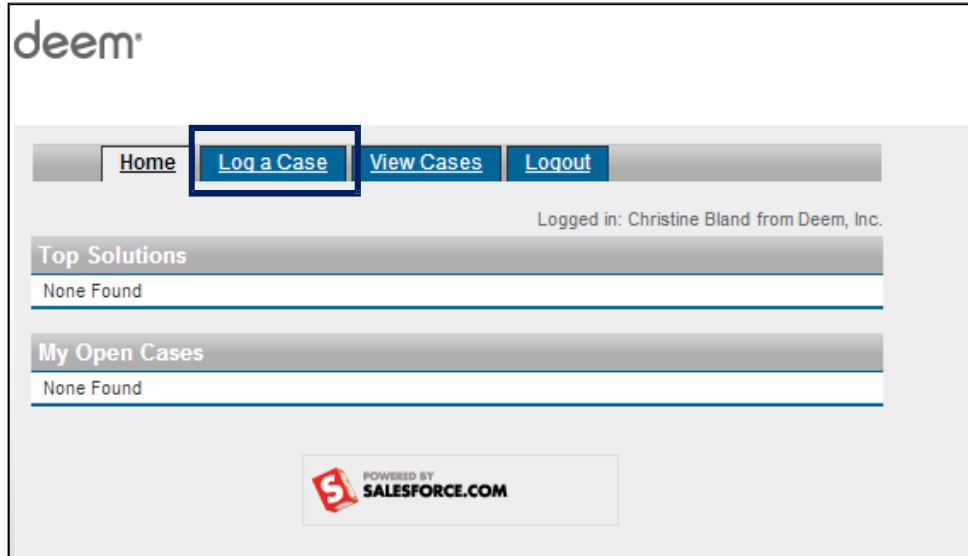
1. Sign into the Customer Support Portal found at <http://support.deem.com/> using your email address as the User Name and enter your Password.



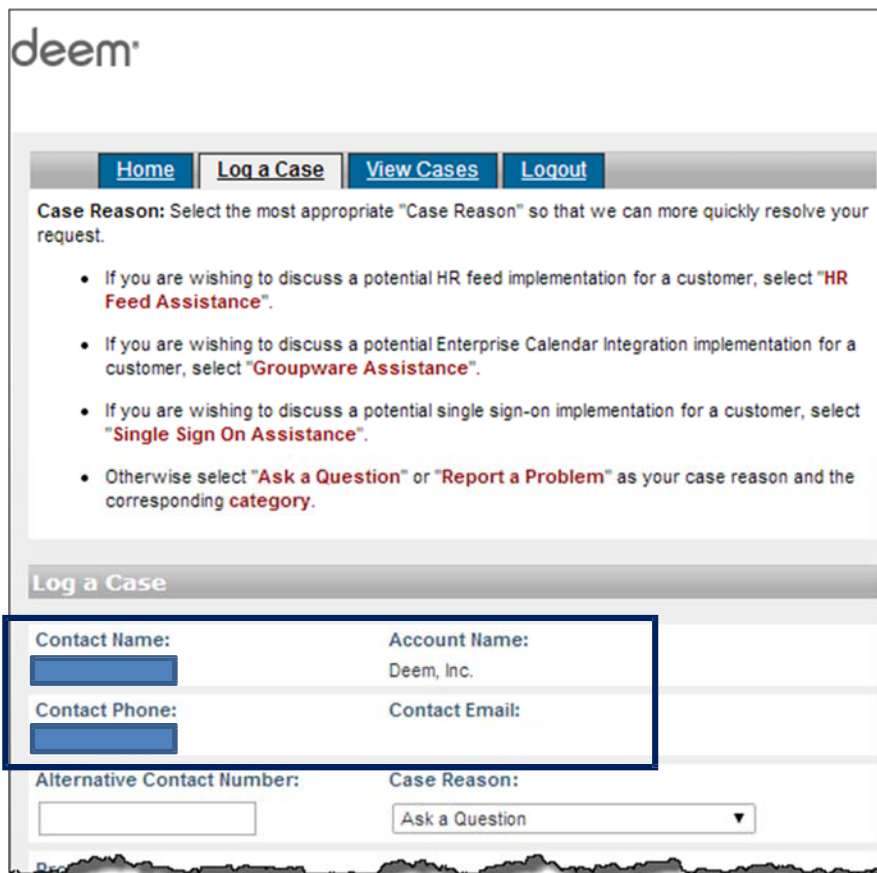
The screenshot shows the login interface for the deem.com customer support portal. At the top left is the "deem" logo. Below it is a grey header bar with the text "Secure Customer Login:". The main content area contains two input fields: "User Name:" with the value "christine.bland@deem.com" and "Password:" with an empty field. To the right of the password field is a blue link that says "Forgot your password?". Below the password field is a blue "Login" button.



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



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



Scroll down to see bottom of the page:

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

- Product: \***: A dropdown menu with "--None--" selected.
- Customer Priority: \***: A dropdown menu with "3 - Normal" selected.
- Subject: \***: A text input field.
- Permission to Test: \***: A dropdown menu with "--None--" selected.
- Description: \***: A large text area.
- Steps to Reproduce Error: \***: A text area.
- Customers Internal Ticket:**: A text input field.
- At the bottom, there are two buttons: "Submit" and "Cancel".

📌 Note required fields marked with an “\*“:

- o Case Reason
- o Product
- o Customer Priority
- o Subject
- o Permission to Test - Always give us permission to test
- o Description
- o Steps to Reproduce Error

4. Select a Product from the drop down list. Products include:

- o Airport Parking
- o False Ticket
- o Mobile
- o Offers
- o Purchase
- o Travel

- o User Access
- o Non-supported end user
- o Database Feeds and Reports
- o and others

5. Determine the Urgency of the Request:

Reporting an Urgent Issue -

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

---

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

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Reporting a Non-Urgent Issue or Request:

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

6. Determine the Priority:

- 1 - Urgent - Crash / Data Loss
- 2 - High - Major / No Workaround
- 3 - Normal - Minor / Workaround
- 4 - Low - Cosmetic / Trivial

7. Complete the remaining fields:

- Select the Case Category from the drop down list
- Enter the Case Subject that provides a summary of what you are experiencing
- Enter the Case Description: Provide a more detailed description of the issue
  - o Include the site name where the issue is occurring

- o Include the Process ID if possible - found at the end of the URL on the Trip Details page



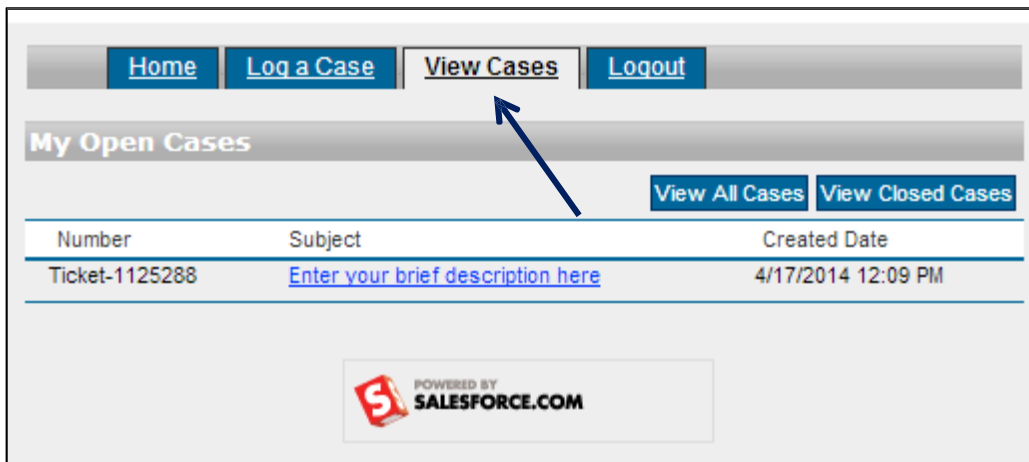
- o If you are using a generic Support Portal log in, provide your contact information
- o Provide the name of the user who is experiencing the issue
- o Provide specific Steps to reproduce the issue

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

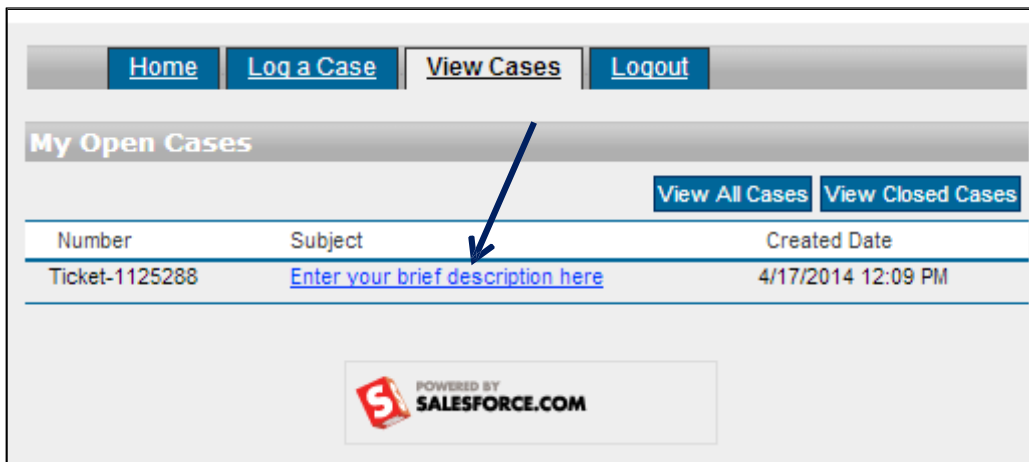
Note - Attachments / comments can be added after the case is submitted.

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

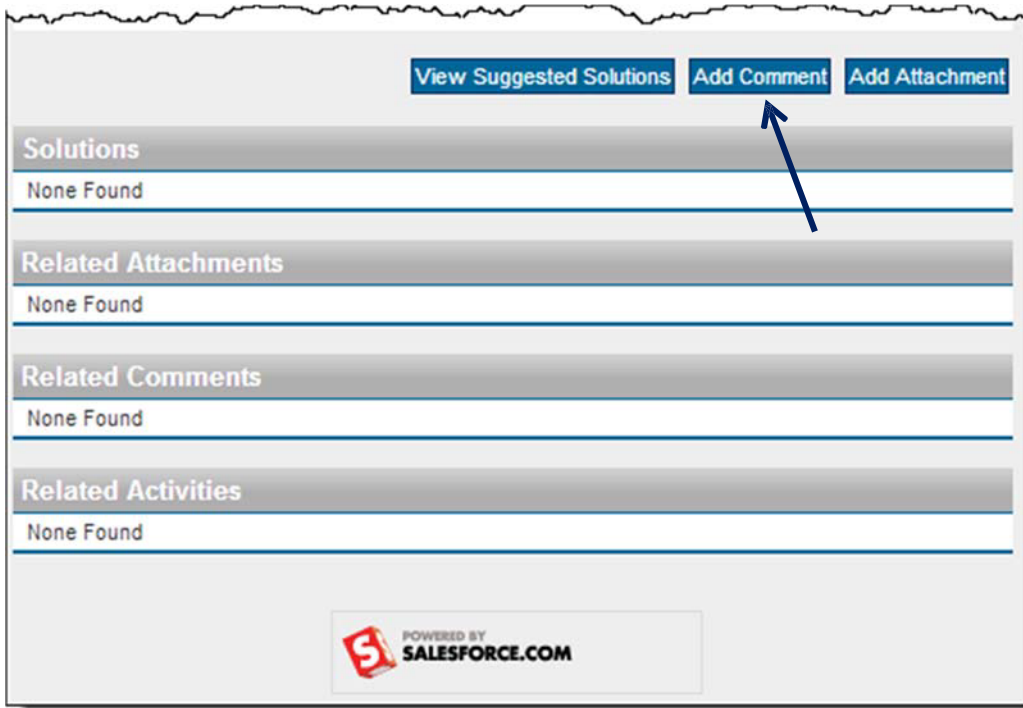
1. Sign into the Customer Support Portal using your email address as the User Name and Password.
2. The Home page is displayed. Click the **View Cases** tab to view an existing issue.



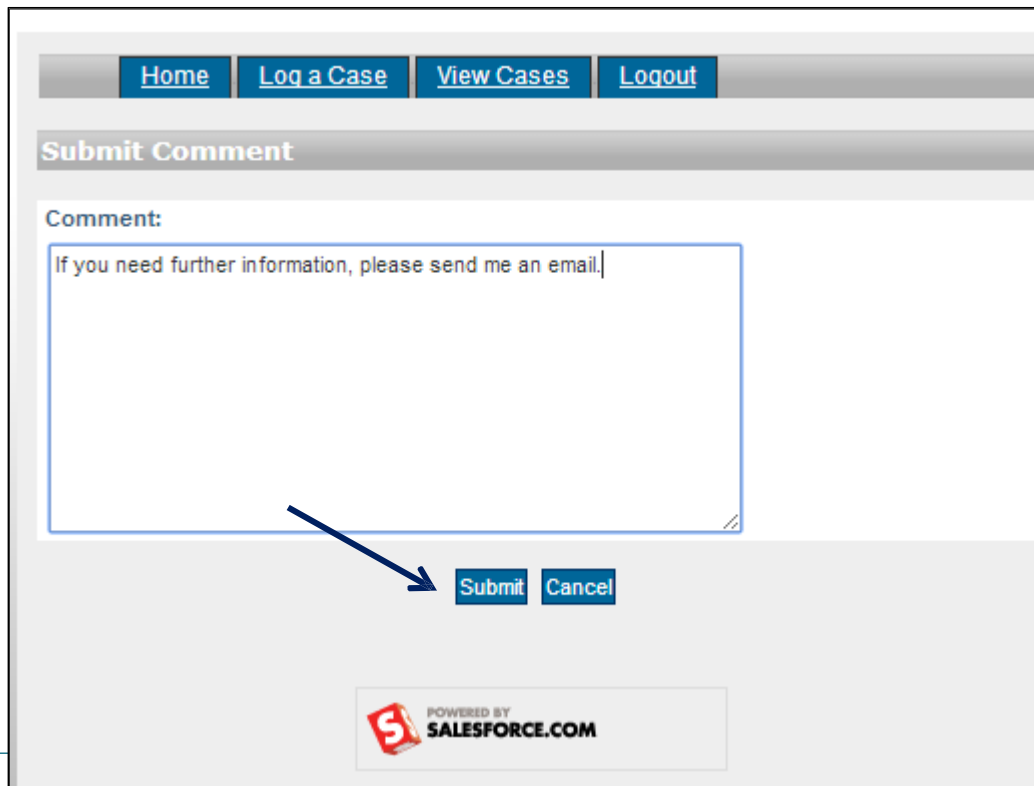
3. While on the View Cases tab, click the **Subject** link of the case to view the case.



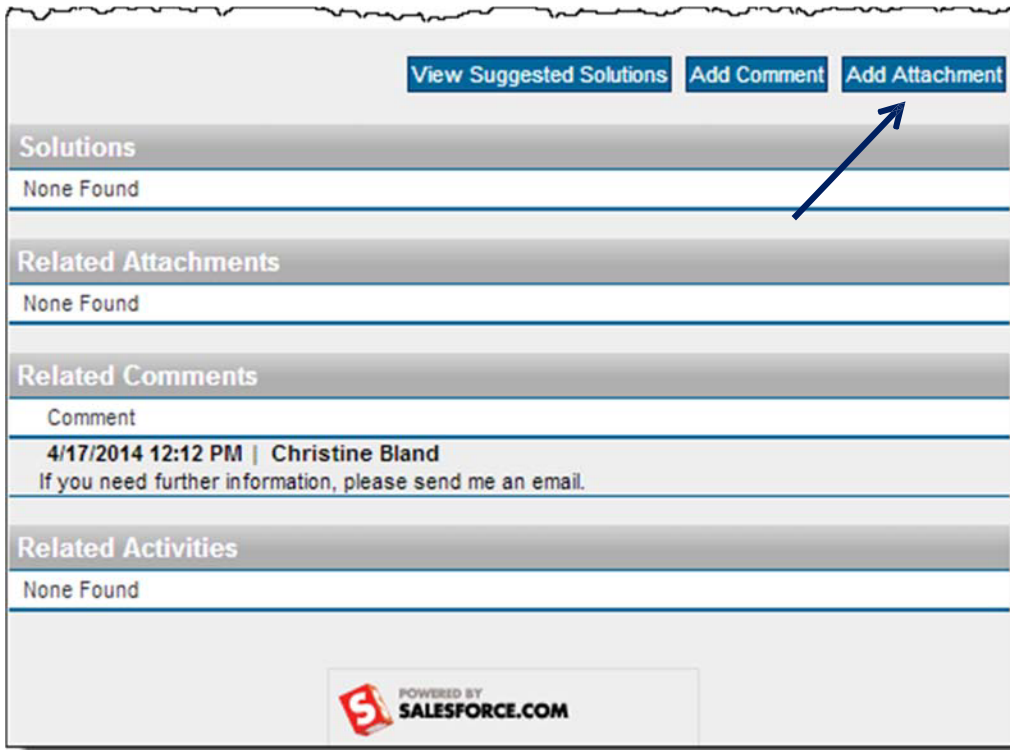
4. Scroll down to the bottom of the page and click the **Add Comment** tab to add a comment to this case.



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



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



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

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

[Home](#) [Log a Case](#) [View Cases](#) [Logout](#)

### Attach File

**1. Select the File**  
Type the path of the file or click the Browse button to find the file.

No file chosen ←

**2. Click the "Attach File" button.**  
Repeat steps 1 and 2 to attach multiple files.  
( When the upload is complete the file information will appear below. )


←

**3. Click the Done button to return to the previous page.**  
( This will cancel an in-progress upload. )

←

**You have just uploaded the following file:**

File Name	Executive Summary V Release.docx
Size	14KB

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

[View Suggested Solutions](#) [Add Comment](#) [Add Attachment](#)

**Solutions**

None Found

**Related Attachments**

Attachment Name	Size	Last Modified
<a href="#">Executive Summary V Release.docx</a>	14KB	4/17/2014 12:13 PM


**Related Comments**

Comment

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

**Related Activities**

None Found

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## 4.4 Logging Out of the Support Portal

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



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