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Deem Travel Partner Dashboard Training - Module Two – Travel (Part 1) Version 17, October 19, 2015

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1 Module Series Overview

Welcome to Deem's Basic Dashboard Training.

Whether this is an introduction to the Partner Dashboard or it is a refresher, we are confident that needed information about the dashboard will be gathered during each section of this course.

As an Administrator or Reseller of the Deem Travel application, the basics of administering users, managing policy, understanding customization, reporting features and enabling additional long tail services will be learned. These have all been identified as areas of key customization after the template site has been configured for the successful site administrator.

Classes have been arranged in a logical consecutive flow and will be offered several times each year. The content and learning objectives for each module are designed to stand alone so if necessary, some of the modules can be taken now and others can be attended during later series to complete the course, as time allows. We also offer session recordings that can be downloaded and listened to at a more convenient time.

In preparation for any of the online training sessions, please become familiar with the documentation required for each module.

We are glad you could join us!

2 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 the module series classes. The Profiles tab is covered in the Advanced User Data class.

2.1 Resource Links

Resource Links are travel related links that are displayed to the user on the travel planner page. When a new site is created, a generic list of links is included. Customizing or modifying these links is quick and easy.

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.

Partner Dashboard

Sites Administrators Groups Configuration

Sites | Overview

Sites
Manage Sites

Templates
Manage Site Templates

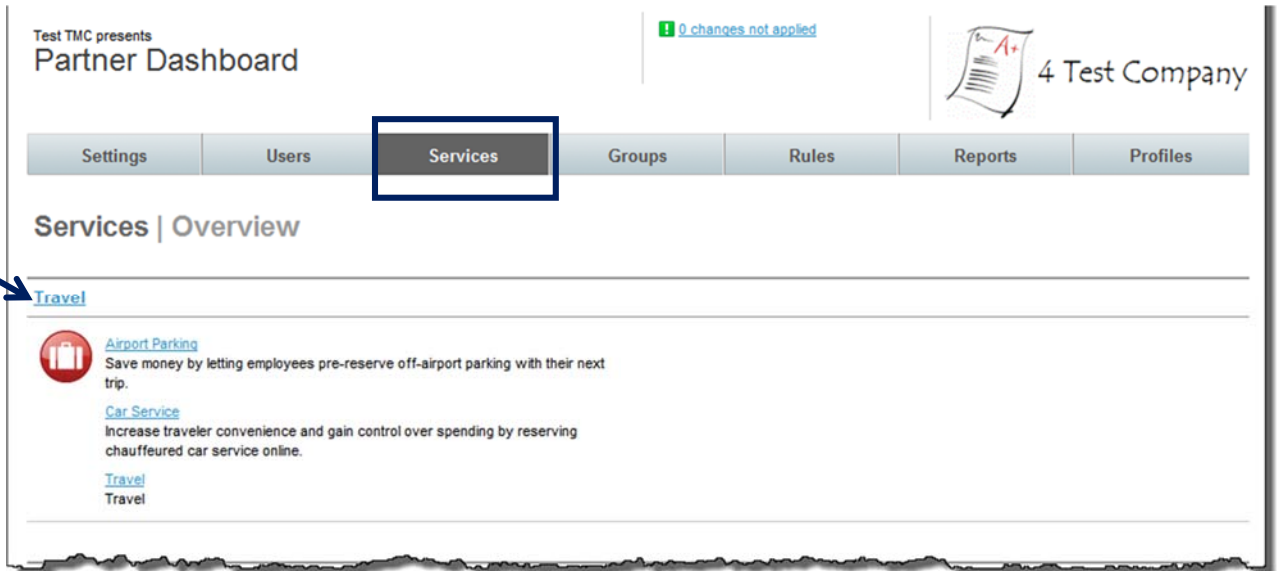
Search company name or site id

Quick links [All](#) # [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

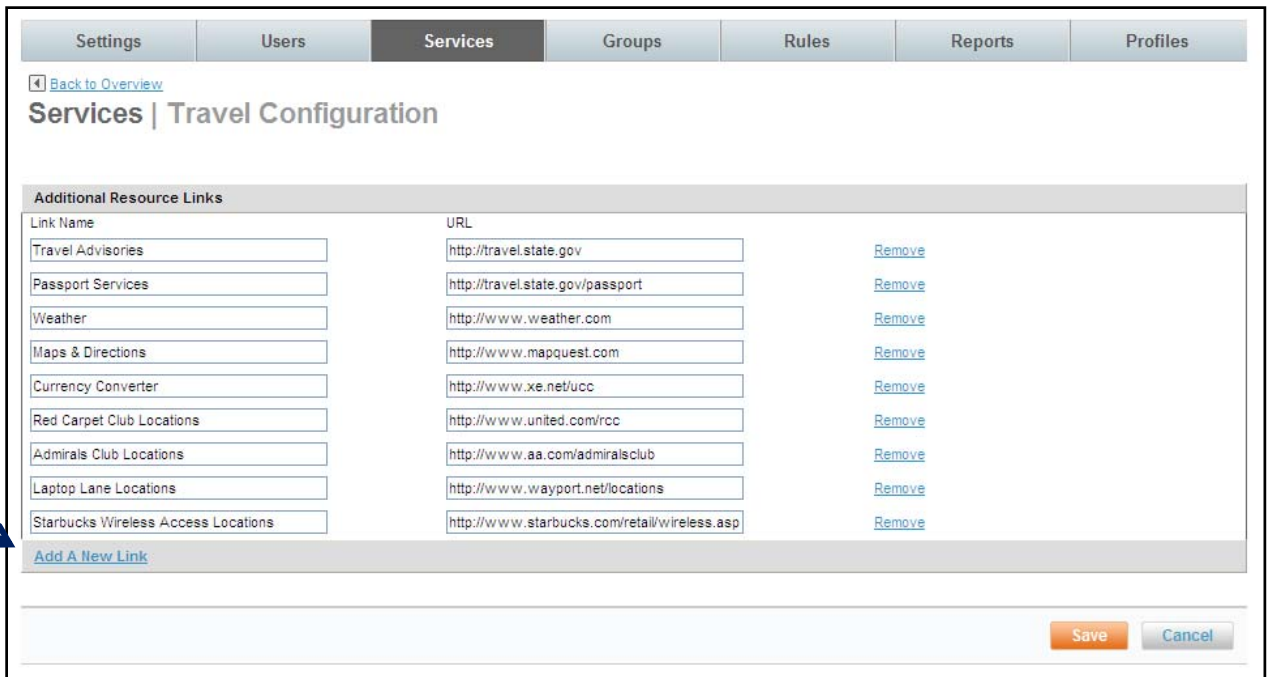
11 out of 11 records [+ Add A New Site](#)

Company Name	Site ID	Edit Site	Groups
4 Test Company Template (Test TMC)	4testcompanytemplate-testtmc	Settings Name	Groups
4 Test Company Test Site (Test TMC)	4testcompanytestsite-testtmc	Settings Name	Groups
4testims-testtmc	4testims-testtmc	Settings Name	Groups
4testrestricted	4testrestricted-testtmc	Settings Name	Groups
ABC Company (Test TMC)	abccompany-testtmc	Settings Name	Groups

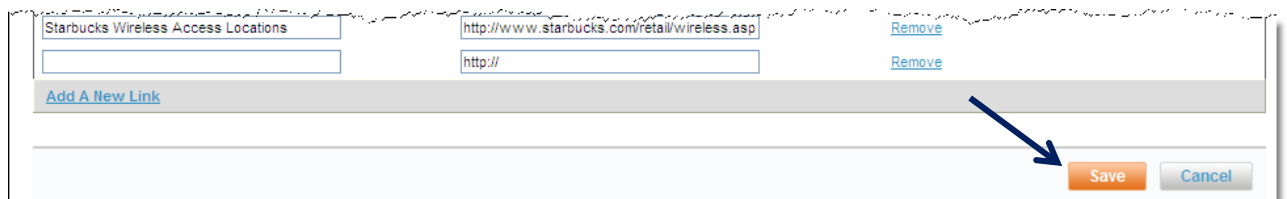
3. The **Settings** tab is displayed. Click the **Services** tab then the **Travel** link found above the suitcase.



4. The **Services | Travel Configuration → Additional Resource Links** page is displayed. Click the **Add a New Link** link to add a new link.



5. A new line opens. Enter the resource link information. The link name will be displayed to end-users and the URL will be used to access the site.



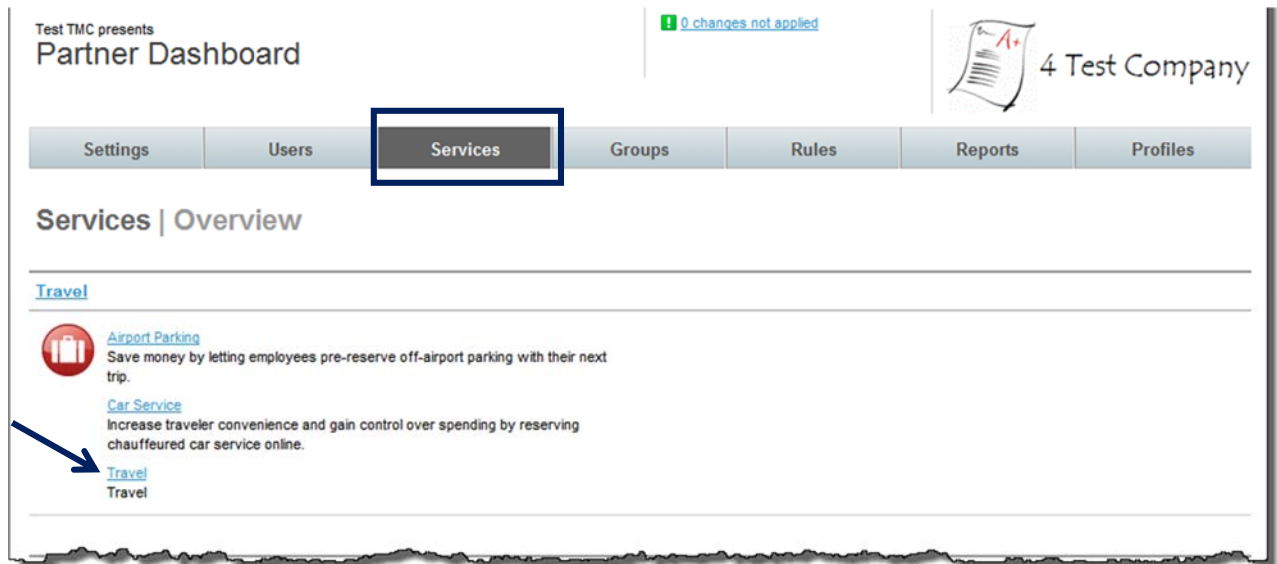
Note: A link can be a company intranet link as well as internet links.

6. Click **Save** to save any changes and remember to commit your changes.

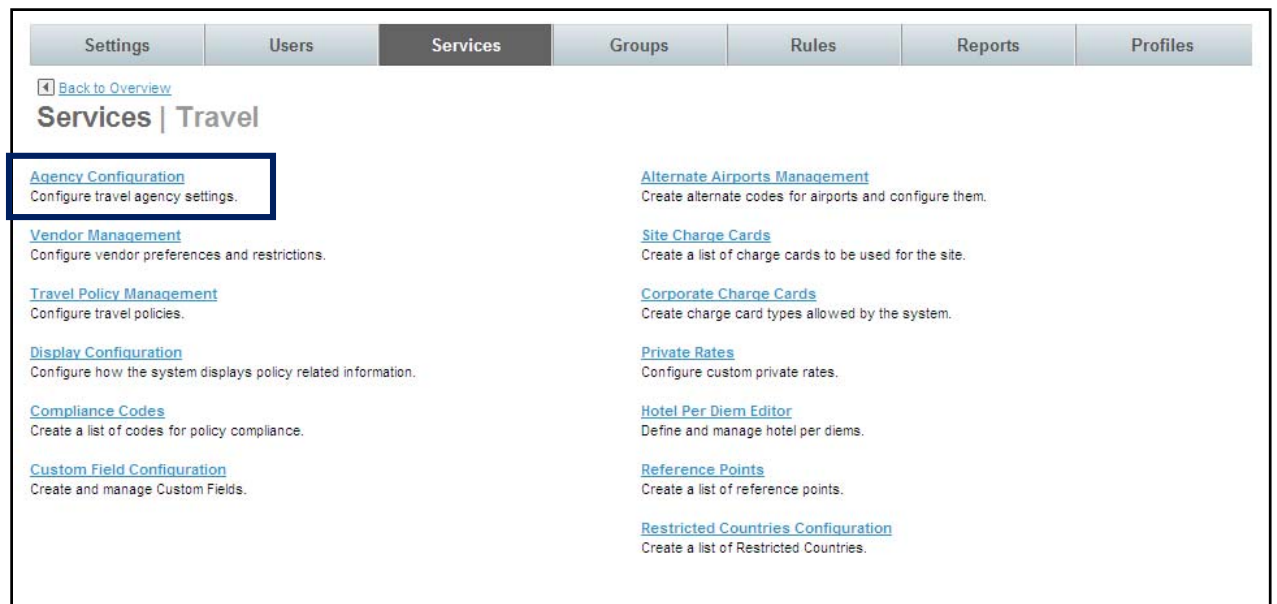
2.2 Agency Configuration

When a site is cloned from a template, Agency Configuration settings are cloned too. Most 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.

1. Click the **Services** tab then the **Travel** link in the **Travel** section of the page.



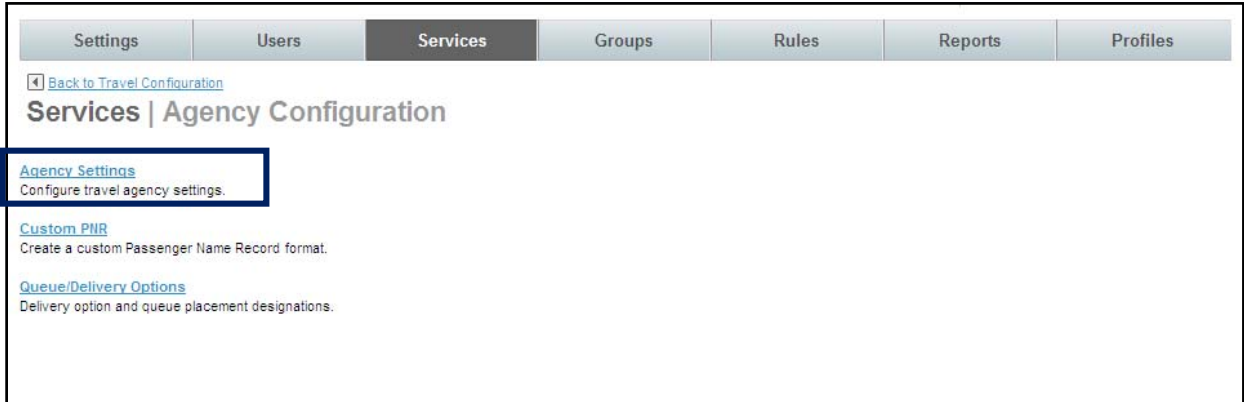
2. The **Services | Travel** page opens. Click the **Agency Configuration** link.



3. The **Services | Agency Configuration** page opens. Click the **Agency Settings** link.

2.2.1 Agency Settings

Agency specific configuration includes the agency's PCC, pricing codes and several other agency specific settings.



1. The **Services | Agency Settings** page opens. Click **Add A New Agency Setting** to add a new record, or click the name link of an existing agency setting record to edit that record. The **Services | Edit** or **Add Agency Setting** page is displayed.



Note: If the site has been cloned, many of these settings will already be in place. Adjustments may only be needed to the agency settings.

- **Agency Configuration Settings:**

- **Setting Name:** (Required) Name the agency configuration. This name should be easily recognizable as a specific agency configuration. An example is *Sabre Config* to show that this one uses Sabre vs. Worldspan. Other examples of the need for additional agency configurations are different PNR edits, different Pseudo cities or queue delivery options.

- **Host Information:**

- **GDS:** (Required) Select the Global Distribution System from the drop down list.
- **TA Groups:** (Required) Terminal Address: Must be set to *ExternalSabreNew* for Sabre, (*ExternalSabre* is an old setting) *ExternalApollo* for Apollo, *ExternalGalileo* for Galileo or *ExternalWorldspan* for Worldspan.
- **Pseudo-City Code:** (Required) Enter the agency’s pseudo-city code.
- **Default Queue:** (Required) Enter the queue to use as a default. This queue can be changed for more specific queue delivery
- **Sales Location:** (Required) Enter the airport code associated with the agency’s pseudo-city used for faring with ITA.
- **Ticketing TA Group:** Used with void / exchange feature
- **Ticket Printer Address:** Used if void / exchange feature is enabled
- **Itinerary / Invoice Printer Address:** Used with void / exchange feature
- **Hardcopy Printer Address:** Used with void / exchange feature

Note: Enter a ticket and Support will help configure our void / exchange feature

- **Ancillary Sources:** Click the **Add Ancillary Source** link to add a source. The **Add Ancillary Source** page is displayed. Once the Source has been selected from the drop down list, the remainder of the page will display.

Note: An Ancillary Sourced provider is one that does not use ITA as their fare / availability provider

- **Source Name:** (Required) Enter the ITA non-participating carrier. (ITA is our shopping and booking tool) GDS or TravelFusion are used to source these carriers. Examples: Southwest (GDS directly) or BMI Baby (TravelFusion).
- **Source:** (Required) Select GDS – Apollo, GDS – Galileo, GDS – Sabre, GDS – Worldspan, or Web – TravelFusion from the drop down list.

Note: Other options may be available depending on your site’s configuration.

Note: If GDS: Sabre, Apollo, Worldspan or Galileo are selected the following page is displayed:

- **TA Group:** Select the appropriate TA Group from the drop down list
- **Pseudo City Code:** Provide the Pseudo City Code
- **Default Queue:** Provide a queue if appropriate
- **Segment Type:** Select *Flights*, *Hotels*, or *Rental Cars* from the drop down list.
- **Limit to These Vendors:** Enter a list of vendors separated by commas.
- **Use one way low fare search requests for round trip and multi-city flight searches:** Select this check box if the same search parameters will be used for a round trip or multi-city search that were used for this leg. Best practice is to use one way low fare search requests.
- **Airline Private Rate Codes:** Enter any appropriate Private Rate Codes.
- **Source Override:** Select *Replace Primary Source Content*, *Supplement Primary Source Content* or *Exclude Primary Source Content*.
- **Would you like the system to add ancillary passive segments to your primary GDS?** Select *Yes, using Custom PNR*, *Yes, system generated*, or *No, do not add passive segments to primary GDS*

Note: It is recommended to select either *Yes, system generated*, or *No, do not add passive segments to primary GDS*.

Note: If Source: WEB: TRAVEL fusion is selected, only “Airline”, “Source Override” and “Would you like the system to add ancillary passive segments to your primary GDS fields” are displayed.

Airlines supported include: Aer Arann, Aer Lingus, Air One, Allegiant Air, Azul, bmibaby, Eastern Airways, easyJet, Flybe, Germanwings, Interjet, Jet2, JetBlue, Manx2, Monarch Airlines, Norwegian, Ryanair, TUIfly, Volaris and Wizz Air.

Note: Airlines are added frequently. Please refer to the dashboard for the latest entries.

The screenshot shows a web interface for adding an ancillary source. At the top, there are navigation tabs: Settings, Users, Services (selected), Groups, Rules, Reports, and Profiles. Below the tabs is a breadcrumb link: [Back to Edit Agency Setting](#). The main heading is "Services | Add Ancillary Source". Underneath, there is a section titled "Ancillary Source" containing the following form elements:

- Source Name:
- Source:
- Airline:
- Source Override: Replace Primary Source Content, Supplement Primary Source Content, Exclude Primary Source Content
- Would you like the system to add ancillary passive segments to your primary GDS? Yes, using Custom PNR, Yes, system generated, No, do not add passive segments to primary GDS

At the bottom right of the form, there are two buttons: "Save" (orange) and "Cancel" (grey).

- Click **Save** to save the entry. The **Services | Add (or Edit) Agency Setting** page is redisplayed.

- **Agency Information:**

The screenshot shows a web form with two main sections: 'Agency Information' and 'Agency Contact'. The 'Agency Information' section includes fields for Agency Name (Deem, Inc.), ARC Number (99999999), Hotel ARC Number Override, Rental Car ARC Number Override, IATA Number (99999999), Country (United States), Street address (1001 E Hillside Blvd), Apartment / Suite (8th Floor), City (Foster City), State (California), ZIP code (94404), and Time Zone (Pacific Daylight Time). The 'Agency Contact' section includes fields for Name (Chris Bland), Title (Training Manager), Phone (650 376-8749), Toll-Free Phone (optional), Mobile Help Desk Label (optional), Mobile Help Desk Phone (optional), and Email (christine.bland@deem.com).

- **Agency Name:** (Required) Enter the agency name. Be careful to not exceed 30 characters.
- **ARC Number:** (Required) Enter the agency ARC number.
- **Hotel ARC Number:** Enter the agency hotel ARC number.
- **Rental Car ARC Number:** Enter the agency rental car ARC number.
- **IATA Number:** (Required) Enter the agency IATA number.

Note: The IATA number should not include alpha or special characters.

- **Country:** Enter the agency country.
- **Street Address:** Enter the agency street address.
- **Apartment / Suite:** Enter the agency apartment or suite number.
- **City:** Enter the agency city.
- **State:** Enter the agency state.
- **Zip code:** Enter the agency zip code.
- **Time Zone:** (Required) Enter the agency time zone used for ticketing cancelation.

- **Agency Contact:**

- **Name:** (Required) Enter the contact name. This name will display on the Trip Confirmation Page and print on the trip's itinerary.
- **Title:** (Required) Enter the contact title. This information is used by Deem internal personnel for reference only.
- **Phone:** (Required) Enter the contact phone number. This phone number will display on the Trip Confirmation Page and print on the trip's itinerary.

- **Toll-Free Phone:** Enter the contact toll free phone number. This phone number will display on the Trip Confirmation Page and print on the trip’s itinerary.
- **Email:** (Required) Enter the contact email address. This information is used by Deem internal personnel for reference only.

- **Message to Users (Optional):**

Message to Users (optional)
This message will be displayed to user on the Purchase Page, Confirmation Page, Trip Detail Page, e-Receipt, Trip Notifications, and Calendar Entries. Do not input HTML tags.

Enable confirmation notifications from Test TMC

- **Text box provided:** Enter a message to display to users on the Purchase Page, Confirmation Page, Trip Detail Page, e-Receipt, Trip Notifications, and Calendar Entries. Do not use HTML tags or Travel lingo.
- **Enable confirmation notifications from *site name*:** Click this checkbox to enable email confirmations to be sent from this site.

Note: It is **Recommended** this checkbox be selected.

- **Domestic Definition:**

Domestic Definition
Select countries that define domestic travel:

Selected Countries
United States

Countries
Afghanistan
Albania
Algeria
American Samoa
Andorra

- Select the countries that define domestic travel and click **Add** to move them to the **Selected Countries** box. These countries will fall under the domestic travel requirements. All others will be considered International.

Note: Search results windows and Queue Delivery Options may differ depending on the domestic / international designation.

- **PNR Configuration:**

PNR Configuration
Booking Configuration* None

PNR Synchronization Settings
No PNR Synchronizations currently defined.
[Add Synchronization Setting](#)

- **Booking Configuration:** Select a PNR edit configuration from the drop down list for this agency. This identifies what PNR edit sets to use for this agency configuration.

- **PNR Synchronization Settings:** Add the GDS to use for PNR synchronization. Click the **Add Synchronization Settings** link. The **Services | Add PNR Synchronization** page is displayed.

Note: It is recommended PNR Synchronization be enabled for ONE SITE only if all properties are the same across the sites. Enabling PNR synchronization on multiple sites adds unnecessary GDS churn.

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

[Back to Edit Agency Setting](#)

Services | Add PNR Synchronization

PNR Synchronization

Acquire off-line PNR's

Select a GDS: Sabre

TA Group: ExternalSabreNew (current agency TA group)

Acquisition Queues

Enter the pseudo-city where PNR's are to be acquired:
1234

Enter the queue where off-line PNR's are placed for acquisition:
10

Enter the pseudo-city where off-line PNR's are to be processed, if different from above:
 (optional)

Enter the first queue where off-line PNR's are to be processed:
11

Enter the second queue where off-line PNR's are to be processed:
12

Acquisition Failure Queue

Enter the pseudo-city for the queue where PNR's that fail acquisition are placed, if different from the acquisition pseudo-city:
 (optional)

Enter the queue (with queue action if appropriate) where off-line PNR's that fail acquisition are placed:
 (optional)

Owner Identification

Select the method used to look up the owner of a PNR:
Use unique identifier

Enter prefatory remarks that precede the traveler's unique identifier in the PNR:
SYNCH-ID10

Hours of Operation

Select the hours of operation for this PNR synchronization configuration:
Always on (24 hours a day, 7 days a week)

Select how frequently PNR synchronization should be attempted:
Every 60 minutes

Save Cancel

- **Acquire off-line PNR's:** Select the checkbox to acquire off-line PNR's.
- **Select the GDS:** Select the GDS from the drop down list
- **TA Group:** Must be set to *ExternalSabreNew* for Sabre, (*ExternalSabre* is an old setting) *ExternalApollo* for Apollo, *ExternalGalileo* for Galileo or *ExternalWorldspan* for Worldspan.

- **Acquisition Queues:**
 - **Enter the Pseudo-city where PNR's are to be acquired:** Enter the pseudo-city code
 - **Enter the queue where off-line PNR's are placed for acquisition:** Enter the first queue to use for off-line PNR's.
 - **Enter the Pseudo-city where PNR's are to be processed if different from above:** Enter the pseudo-city code to use for processing if different from acquisition pseudo-city.
 - **Enter the first queue where off-line PNR's are to be processed:** Enter the first queue to use for off-line PNR processing.
 - **Enter the second queue where off-line PNR's are to be processed:** Enter the second queue to use for off-line PNR processing.
- **Acquisition Failure Queue:**
 - **Enter the pseudo-city for the queue where PNR's that fail acquisition are placed, if different from the acquisition pseudo-city:** Enter the pseudo-city to use for failed synch requests.
 - **Enter the queue (with queue action if appropriate) where off-line PNR's that fail acquisition are placed:** Enter the queue to use for failed synch requests.

Note: It is the responsibility of the agency to monitor failed acquisitions.

- **Owner Identification:**
 - **Select the method used to look up the owner of a PNR:** This is set during implementation and there is no need to change. It is a Best Practice to use "Unique Identifier".
If "Unique Identifier" or "Login Name" were selected, an additional text box is displayed.
Enter prefatory remarks that precede the traveler's _____ in the PNR.
- **Hours of Operation:** Our scripts run every hour on the half hour. If scripts are to run more or less frequently or at a different time configure the timing here.
 - **Select the hours of operation for this PNR synchronization configuration:** Select Always On or Specific Hours and then define the hours of operation.
 - **Select how frequently PNR synchronization should be attempted:** Select the frequency to use for synchronization.

Note: Please remember that each time PNR synchronization is triggered there are GDS hits and this can incur charges. We recommend setting the interval to no more than every 60 minutes.

Note: When an error occurs during PNR synchronization, a Passive segment can be created, depending on if passive segments were enabled during the Agency Display Configuration.

- **Passive Segment Processing:** Not used very often. If passive segments will be used, Deem Configuration Team can assist in creating this JavaScript.

Passive Segment Processing

Passive Car Segments
Enter a javascript that will construct the GDS command to sell a passive car segment.

Enter a javascript that will parse the variable portion of a passive car segment.

Passive Hotel Segments
Enter a javascript that will construct the GDS command to sell a passive hotel segment.

Enter a javascript that will parse the variable portion of a passive hotel segment.

- **Passive Car Segments:** No longer used.
- **Passive Hotel Segments:**
 - **Enter a JavaScript that will construct the GDS command to sell a passive hotel segment:** When passive segments are enabled, JavaScript entered here is used to process the passive segment.
 - **Enter a JavaScript that will parse the variable portion of a passive hotel segment:** If an error occurs during PNR synch due to agency unique requirements, enter JavaScript here that re-write the script for the PNR to succeed.

- **Travel Settings:**

Travel Settings
Enter the default passenger type code to be used for air pricing:

Customer Code (blank is "ADT")

Negotiated Rates
Enter the customer code that is used to query for airline negotiated rates in the GDS:

Customer Code (optional)

Enter the ATPCO account codes that are used to query for airline negotiated rates from IATA:

Account Codes (optional, separated by a comma)

Specify the locales associated with the ATPCO account codes:

Pseudo City Locale Sales Home

IATA Locale Sales Home

- **Enter the default passenger type code to be used for air pricing:**
 - **Customer Code:** (blank is "ADT") If not code is entered, the default is Adult.
- **Negotiated Rates**
 - **Enter the customer code that is used to query for airline negotiated rates in the GDS:** This code will be sent to the GDS to retrieve the negotiated rates.

- **Enter the ATPCO account codes that are used to query for airline negotiated rates from ITA:** This code will be sent to ITA to retrieve the negotiated rates.
- **Specify the locales associated with the ATPCO account codes:**
 - **Pseudo City Locale: Sales or Home.** Generally Sales is selected.
 - **IATA Locale: Sales or Home.** Generally Sales is selected.

- **Train Support:**

Note: To enable VIA Rail in Canada, complete the **Train Support** section as you would for US's Amtrak. However, the **Sales Location** found at the top of the **Agency Settings** page must be a Canadian airport code.

Train Support

Channel

Agent Identifier

Customer Identifier (A customer specific identifier should be created during implementation to inform SilverRail who these bookings are for. This field is used for reporting purposes only.)

Client ID Number ⓘ

Customer DK Number ⓘ

Amtrak Specific Support:

Add passive train segment to primary GDS? No Yes

Message for Train support procedure and phone numbers: ⓘ

Train support phone number for mobile client: ⓘ

ATOC(UK) Specific Support:

Message for Train support procedure and phone numbers: ⓘ

Train support phone number for mobile client: ⓘ

Queue/Delivery Options

Options Set* Default Queue Set ▼

Pre Trip approval settings

[Add PTA Configuration](#)

- **Channel:** Enter the SilverRail supplied Channel code. (AXIOM, REARDEN or TVLPORT if the site is not using a site card. AXIOMSC, REARDENSC or TVLPORTSC if using a site card.). Must be all caps.
- **Agency Identifier:** Enter the SilverRail supplied Agency Identifier. Must be all caps.
- **Customer Identifier:** Enter the SilverRail supplied Customer Identifier. Must be all caps. This identifier defines a specific customer and should be created during implementation. The field is used for reporting only.
- **Client ID Number:** Enter the number to be used when optional reporting is required.
- **Customer DK Number:** Enter the number to be used when optional reporting is needed.

- **Amtrak Specific Support:**
 - **Add passive train segment to primary GDS?:** Yes or No.
 - **Message for Train support procedure and phone numbers:** Enter the message to be displayed to the traveler on the purchase page and on confirmation messages. Do not include HTML tags or travel lingo.
 - **Train support phone number for mobile client:** Enter the phone number to be displayed in the mobile client if the number is different from other support numbers
- **ATOC(UK) Specific Support:**
 - **Message for Train support procedure and phone numbers:** Enter the message to be displayed to the traveler on the purchase page and on confirmation messages. Do not include HTML tags or travel lingo.
 - **Train support phone number for mobile client:** Enter the phone number to be displayed in the mobile client if the number is different from other support numbers.
- **Queue / Delivery Options**
 - **Options Set:** (Required) Select the pre-defined Queue / Delivery Options Set for PNR (for ticketing, invoice, etc.) processing.
- **Pre Trip approval settings:** Click the **Add PTA Configuration** link to access Pre-trip approval settings.

Note: For more information about PTA, please contact your Account Success or Sales Manager.

2. Click **Save** to save the changes. Click the “**_ changes not applied**” link to commit the changes.
3. The changes made since the last time a commit was done are displayed. Click the **Commit** button to commit the changes to the database.

2.2.2 Custom PNR

Custom PNR string edits are performed to complete the GDS reservation. This allows the PNR to be sent to GDS with very little agency touch. The configuration can contain basic information like adding a cost center to a name field or can be more complex, like documentation for ticket exchanges. In general, custom PNR strings are created by the Deem configuration team during the site implementation process. Modification to PNR strings are the responsibility of the client, however, Deem is available to assist in any needed changes.

To determine which PNR edit strings are needed, Deem studies a typical agency booking and attempts to duplicate standard entries. This could include UDIDs, specialized cost savings documentation and variable credit cards options based on departmental requirements.

To access the PNR string edits:

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

- a. Click the **Agency Configuration** link. The **Services | Agency Configuration** page is displayed.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Travel Configuration](#)

Services | Agency Configuration

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

Custom PNR
Create a custom Passenger Name Record format.

[Queue/Delivery Options](#)
Delivery option and queue placement designations.

- b. Click the **Custom PNR** link. The **Services | Custom PNR Configurations** page is displayed. Click the link below a **Set Name** to view the configuration or click the **Add a New PNR Configuration** to add a new one.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Agency Configuration](#)

Services | Custom PNR Configurations

Custom PNR Configurations

Set Name	Last Update	Used By Travel Agency	
Default Custom PNR	August 14, 2008	Yes	
VIP Custom PNR	January 13, 2009	No	

[Add A New PNR Configuration](#)

- c. The **Services | Add (or Edit) PNR Configurations** page is displayed.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Custom PNR Configurations](#)

Services | Add PNR Configuration

PNR Set Name:

Custom PNR Fields Show: All

Line No.	PNR Field Type	Custom PNR Requirement	GDS	
1	Profile	//FIRST LEVEL STAR MOVE {if((UserPnrData.DataType=="new"))(UserPnrData.DataType=="hold") {out.print("N*-A1B1-ACME#NM");}}	Sabre	Edit Remove
2	Accounting ID	//Name Field & Statement Information var dc = UserPnrData.User.UserInfo.DepartmentCode; {if(((UserPnrData.DataType=="new"))(UserPnrData.DataType=="hold")) (UserPnrData.DataType=="channel")&&(dc!=undefined))	Sabre	Edit Remove
		//MOBILE PHONE		

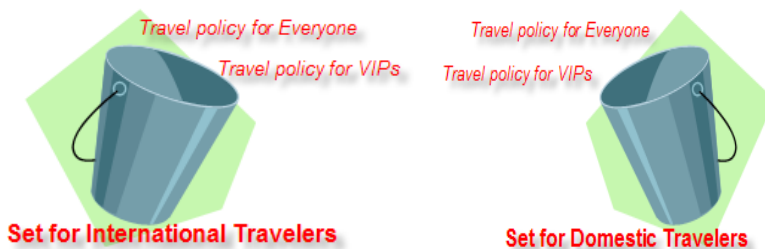
2.2.3 Lists and Sets

The List and Set structure is used throughout the Deem Dashboard.

Using travel policy as an example, a **List** could be the policy set up for the general population of travelers. A second list could be the policy set up for VIP travelers and so on.

A **Set** is a holder, or a “bucket”, into which related lists can be placed. Continuing with the travel policy example, the two lists mentioned (general population travelers and VIP travelers) could be placed in a Set titled Domestic Travelers. If travel policies were then created for internationally based travelers, a set could be created to hold those lists.

Once details have been defined (the list), add them to the holder (set) for use when configuring travel policy. In the dashboard a link for Lists and Sets will be seen under many of the Services functions.

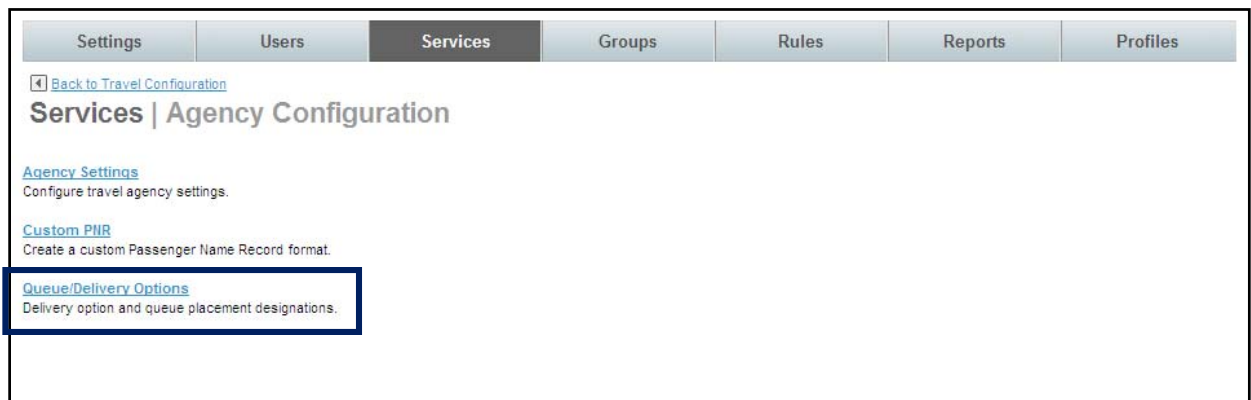


2.2.4 Queue and Delivery Options

Once the PNR is complete, the record must be sent to a queue for processing. It can be sent to the default queue set up on the Agency Configuration, or there can be a different queue set up in this link.

A separate list must be created for each unique delivery requirement. An example is where an airport requires a paper ticket. A list specific to this requirement must be created.

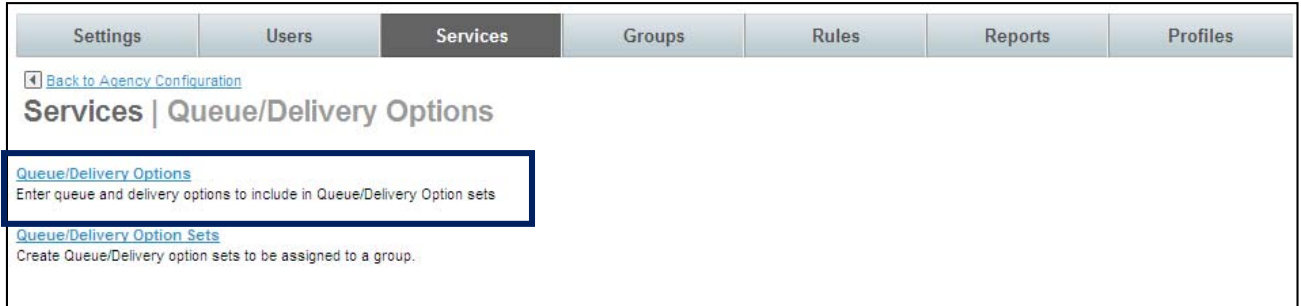
1. From the **Services** tab click the **Travel** link in the **Travel** section of the page. The **Services | Travel** page opens.
2. Click the **Agency Configuration** link. The **Services | Agency Configuration** page opens.



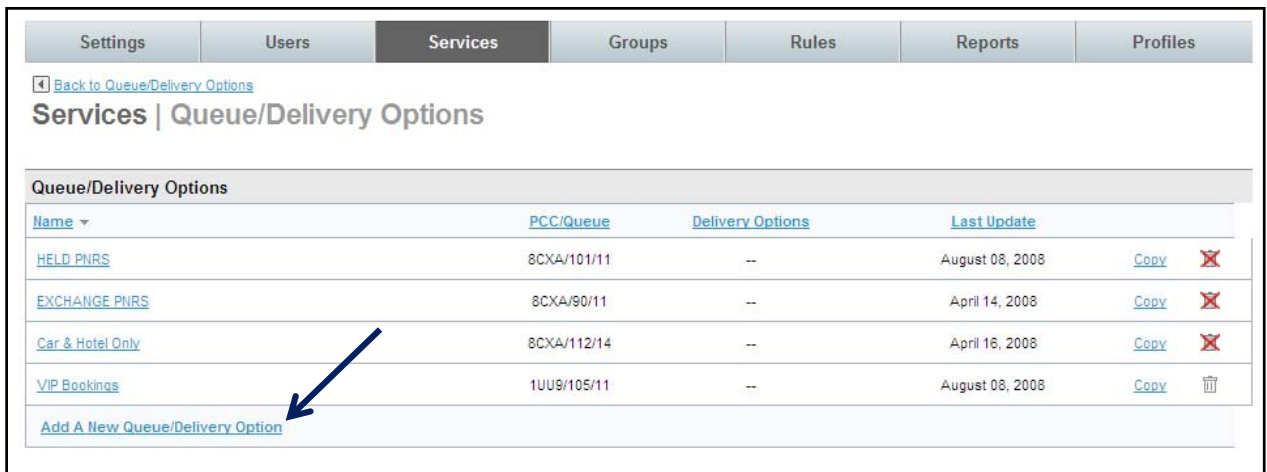
3. Click the **Queue / Delivery Options** link. The **Services | Queue / Delivery Options** page is displayed.
4. Click the **Queue / Delivery Options** link.

2.2.4.1 Queue / Delivery Options List Items

Note: Queue / Delivery Options follow the **List and Set** structure discussed earlier. First we will look at the List of options.

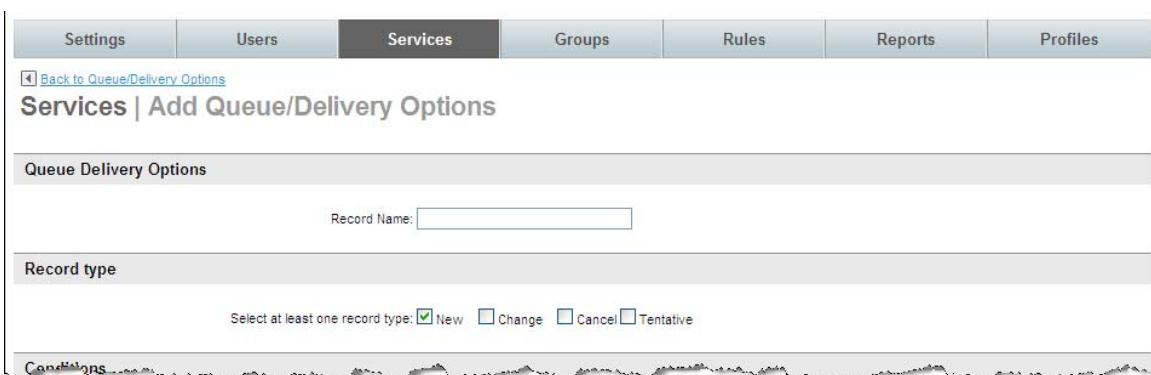


1. The **Services | Queue / Delivery Options** page is displayed.



Note: A PNR must meet ALL of the conditions outlined in queue / delivery options

2. Click the **Add Queue / Delivery Option** link to add a new option, or click the name link to edit an existing one. The **Services | Add (or Edit) Queue / Delivery Options** page is displayed.



3. Complete the page:

- Queue Delivery Options
 - **Record Name:** Enter a record name that will be easily recognizable for the queue.

- **Record Type:** Select at least one record type: *New, Change, Cancel, or Tentative*. This is the type of PNR that the queue delivery option applies to.
- **Conditions:** Set the requirements that must be met by a PNR before the PNR will be placed in this queue.

REMEMBER: ALL conditions must be met for PNR's to fall into this queue.

- **Itinerary Type Conditions:** Select either *All itineraries* or *Selected itineraries*. If *Selected itineraries* is chosen, select the itinerary guideline(s) such as *Itineraries with air segments* - from the drop down list. Multiple guidelines may be selected by using the control key. Select one or more from the drop down list:
 - Itineraries with at least one international segment
 - Itineraries with no international segments
 - Itineraries with a car segment
 - Itineraries with a hotel segment
 - Itineraries with a private rate hotel
 - Itineraries with passive segments
 - Itineraries with hotel only
 - Itineraries with car only

- Itineraries with car and hotel only
- Itineraries with rail segments
- Itineraries with air segments
- **Vendor Conditions:**
 - Select either *All airlines* or *Selected airlines*. If *Selected airlines* was chosen, select the airline(s) from the drop down list. Multiple airlines may be selected by using the control key.
 - Also choose how the airline participates in the itineraries.
 - **Airline supports e-tickets:** Select *Yes*, *No* or *Not Applicable*
 - **Select one or more matching airline class of service:** Select the class of service from the drop down list. Choose more than one class by holding down the control key.
 - **Select one or more car companies that must be included in the itinerary:** Select the car company from the drop down list. Choose more than one by holding down the control key.
 - **Select one or more hotel chains that must be included in the itinerary:** Select the hotel chain from the drop down list. Choose more than one by holding down the control key.
- **Date / Time Conditions:**
 - **Select a ticketing deadline** from the drop down list. *None*, *Any day after tomorrow*, *Today* or *Tomorrow*.
 - **Select a booking date / time range that should be used for itinerary evaluation** from the drop down lists.
 - **Select the airline flight departure, hotel check-in or rental car pickup date / time range that should be used for itinerary evaluation** from the drop down lists.
 - **Select the time range that the booking date must match that is prior to flight departure, hotel check-in or rental car pick-up** from the drop down lists.

○ **Departure Conditions:**

Departure Conditions

Enter one or more comma separated airport codes from which the itinerary must depart to be used for evaluation: [Airport Code](#)

Enter one or more comma separated train station codes from which the itinerary must depart to be used for evaluation: [Station Code](#)

Select one or more US states from which the itinerary must depart to be used for evaluation:

None

Alaska

Alabama

Arkansas

Arizona

Current Selection is: None

Select one or more countries from which the itinerary must depart to be used for evaluation:

None

Afghanistan

Albania

Algeria

American Samoa

Current Selection is: None

Return Conditions

Enter one or more comma separated airport codes from which the itinerary must return to be used for evaluation: [Airport Code](#)

Enter one or more comma separated train station codes from which the itinerary must return to be used for evaluation: [Station Code](#)

Select one or more US states from which the itinerary must return to be used for evaluation:

None

Alaska

Alabama

Arkansas

Arizona

Current Selection is: None

Select one or more countries from which the itinerary must return to be used for evaluation:

None

Afghanistan

Albania

Algeria

American Samoa

Current Selection is: None

- **Enter one or more comma separated airport codes from which the itinerary must depart to be used for evaluation:** Enter the airport code(s). Multiple airports may be selected by using the control key.
- **Select one or more US states from which the itinerary must depart to be used for evaluation:** Select the state(s) from the drop down list. Choose multiple states by using the control key.
- **Select one or more country from which the itinerary must depart to be used for evaluation:** Select the country from the drop down list. Choose multiple countries by using the control key.

○ **Return Conditions:**

- **Enter one or more comma separated airport codes from which the itinerary must return to be used for evaluation:** Enter the airport code(s). Choose multiple airports by using the control key.
- **Select one or more US states from which the itinerary must return to be used for evaluation:** Select the state(s) from the drop down list. Select multiple states by using the control key.
- **Select one or more country from which the itinerary must return to be used for evaluation:** Select the country from the drop down list. Select multiple countries by using the control key.

○ **Other Conditions:**

Other Conditions

Does the matching itinerary contain a ticket with any refundable value? Yes No Not Applicable

Is an unused ticket being recommended for exchange? Yes No Not Applicable

If a ticket is being voided: Yes Not Applicable

If a ticket void or refund attempt fails: Yes Not Applicable

Does the matching itinerary contain Special Handling Instructions: Yes No Not Applicable

Does the record contain multiple passengers: Yes No Not Applicable

Enter the GDS price variance that must be exceeded for matching itineraries: United States Dollar

Create a custom script

- **Does the matching itinerary contain a ticket with any refundable value:** Select *Yes*, *No* or *Not Applicable*.
- **Is an unused ticket being recommended for exchange:** Select *Yes*, *No* or *Not Applicable*.
- **If a ticket is being voided:** Select *Yes*, *No* or *Not Applicable*.
- **Does the matching itinerary contain Special Handling Instructions:** Select *Yes*, *No* or *Not Applicable*.
- **Does the record contain multiple passengers:** Select *Yes*, *No* or *Not Applicable*.
- **Enter the GDS price variance that must be exceeded for matching itineraries:** Enter the price variance and select a unit of measure from the drop down list.
- **Create a custom script:** Enter a custom script to define the requirement for this queue. The Deem Configuration Team can help with this.

● **Actions: The following actions will take place if ALL the above conditions are met:**

Actions

The following actions will take place if all the above conditions are met.

Allow matches to other records: Yes No

Enter the PCC (Pseudo City Code) and Queue where the matched booking record should be placed: Pseudo City Code: Queue:

Place matched booking records on both the assigned and default PCC/Queue: Yes No

Enter the delivery option(s) that should be displayed to traveler on the Trip Purchase page if the itinerary matches:

Show delivery address information with above delivery options: Yes No

- **Allow matches to other records:** Select *Yes* or *No*. Is a PNR allowed to go to more than one queue? If *Yes* is selected, the PNR will go to other queues. If *No* is selected, the PNR will go to the most restrictive queue.

- **Enter the PCC and Queue where the matched booking record should be placed:** Enter a pseudo city code and queue name.
 - **Place matched booking records on both the assigned and default PCC/Queue:** Select *Yes* or *No*. The default queue is the queue assigned on the Agency Settings page.
 - **Enter the delivery option(s) that should be displayed to traveler on the Trip Purchase page if the itinerary matches:** Enter text that does not include travel lingo or HTML tags.
 - **Show delivery address information with above delivery options:** Select *Yes* or *No*. *An example* of when a delivery address is needed would be for a paper ticket.
4. Click the **Save** button to save the configuration. The **Services | Queue / Delivery Options** page is redisplayed. Click the **Back to Queue / Delivery Options** link at the top of the page. (NOT the browser Back button)



2.2.4.2 Queue / Delivery Options Sets

Note: Next, add the **List** (queue policy detail) to a **Set**.

1. Click the **Queue / Delivery Option Sets** link. The **Services | Queue / Delivery Option Sets** page is displayed.



- Click the **Add Queue / Delivery Options Set** link or select a set name to add a List to an existing set. The **Services | Add Queue / Delivery Option Sets** page is displayed.

- Enter a **Set Name** and click the **Add Option** button to add list items to the set. The **Services | Search & Add Queue / Delivery Options** page is displayed.

Select One	Name	PCC/Queue	Delivery Options	Last Update
<input checked="" type="radio"/>	HELD PNRS	8CXA/101/11	--	August 08, 2008
<input type="radio"/>	EXCHANGE PNRS	8CXA/90/11	--	April 14, 2008
<input type="radio"/>	Car & Hotel Only	8CXA/112/14	--	April 16, 2008
<input type="radio"/>	VIP Bookings	1UU9/105/11	--	August 08, 2008

- Select a list item by clicking the radio button beside it and clicking the **OK** button if only one list is to be added to the set or the **OK & Add Another** button to add this one list and then another one to the set. Repeat this step for each item to be added. When selection of lists to add to the set has been completed, click the **OK** button.
- Click **Save** to save the set. Click the “_ changes not applied” link to commit the changes.
- The changes made since the last time a commit was done are displayed. Click the **Commit** button to commit the changes to the database.

2.3 Travel Display Configuration

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

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

1. Click the **Services** tab then the **Travel** link in the **Travel** section of the page.
2. The **Services | Travel** page is displayed. Click the **Display Configuration** link.

The screenshot shows the 'Services | Travel' page with a navigation bar containing 'Settings', 'Users', 'Services', 'Groups', 'Rules', 'Reports', and 'Profiles'. Below the navigation bar is a 'Back to Overview' link. The main content area lists several configuration options:

- [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. (This link is highlighted with a blue box in the original image.)
- [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 | Display Configuration Management** page is displayed.

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

2.3.1 Display Configuration List Items

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

The screenshot shows the 'Services | Display Configuration Management' page with a navigation bar containing 'Settings', 'Users', 'Services', 'Groups', 'Rules', 'Reports', and 'Profiles'. Below the navigation bar is a 'Back to Travel Configuration' link. The main content area lists two configuration options:

- [Display Configuration List](#)**: Create, Edit and Delete travel display configurations. (This link is highlighted with a blue box in the original image.)
- [Display Configuration Sets](#): Create, Edit and Delete travel display configuration sets.

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Display Configuration Management						
<h2>Services Display Configuration List</h2>						
<h3>Display Configuration List</h3>						
Configuration Name ▾		Active	Last Update			
DefaultSettings		Yes	August 11, 2008	Copy	✕	
VIP Display		Yes	August 11, 2008	Copy	✕	
Guest Travel		Yes	August 11, 2008	Copy	✕	
Add A New Display Configuration						

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

Settings	Users	Services	Groups	Rules	Reports	Profiles
Back to Display Configuration List						
<h2>Services Edit</h2>						
<h3>Travel Display Configuration</h3>						
<input checked="" type="checkbox"/> Activate Configuration						
Configuration Name: <input type="text" value="DefaultSettings"/>						
Enable Gravel Experience: <input type="radio"/> Yes <input checked="" type="radio"/> No						
<h3>Policy Display Configuration</h3>						
Evaluate itineraries for compliance with travel policies: <input checked="" type="radio"/> Yes <input type="radio"/> No						
Enter one or more email addresses that will receive travel authorization email replies: <input type="text" value="traveladministrator@yourcompany.com"/>						
Display "Policy Compliant" on airline, hotel and rental car search matrix: <input type="radio"/> Yes <input checked="" type="radio"/> No						

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

- **Display “Policy Compliant” on airline, hotel and rental car search matrix:** Yes or No. This works in conjunction with **Evaluate itineraries for compliance with travel policies:** Yes or No above. If a trip is within policy, the message “Policy Compliant” will be displayed.

- **Air Shopping Display Configuration:**

Air Shopping Display Configuration

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

Select a method for shopping airline itineraries:

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

Enabled schedule based shopping for airline itineraries:

Default search method:

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

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

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

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

Enable shopping for unrestricted fare type:

Enable shopping for refundable fare type:

Select default fare type:

Enable shopping for First Class Cabin: First Class Cabin

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

- **Select the earliest limit of the time range that will be used to search all non-US domestic and non-Canadian airline availability based on the user’s requested time:** Times range from 1 hour to 1 day in hour increments. It is recommended that 4 or 5 hours be selected because of fewer available flights.
- **Select the latest limit of the time range that will be used to search all non-US domestic and non-Canadian airline availability based on the user’s requested time:** Times range from 1 hour to 1 day in hour increments. It is recommended that 4 or 5 hours be selected because of fewer available flights.
- **Enable shopping for unrestricted fare type:** Display unrestricted fares?
- **Enable shopping for refundable fare type:** Display refundable fares?
- **Select default fare type:** Select *Lowest Available*, *Fares with no restrictions*, or *Fares that allow refunds*.

The screenshot shows a settings page with the following options:

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

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

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

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

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

flights for the day of travel. The drop down will remain available to the traveler to select specific times. Selecting *No* will not change the defaulted display times.

- **Allow Morning, Afternoon and Evening flight searches?** Selecting *Use superdomain setting* or *Yes* will display options to search by morning, afternoon or evening – this is current behavior. Selecting *No* will not display this option.
- **Out of policy trips to be bookable?:** Selecting *Yes* makes out of policy flights selectable (they will still be called out of policy) and selecting *No* will not allow the selection of out of policy flights.

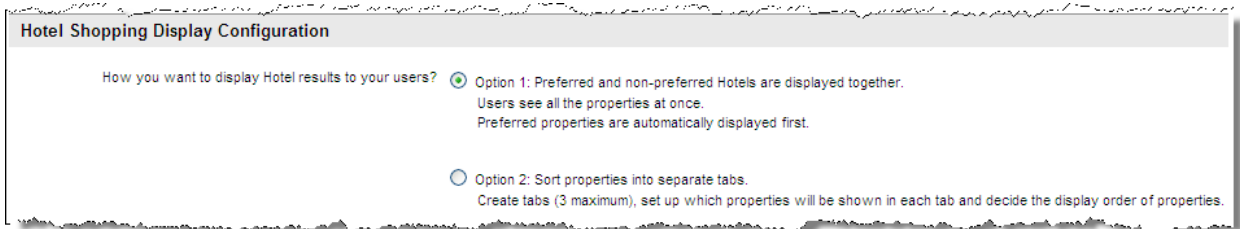
- **Train Shopping Display Configuration:**

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

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

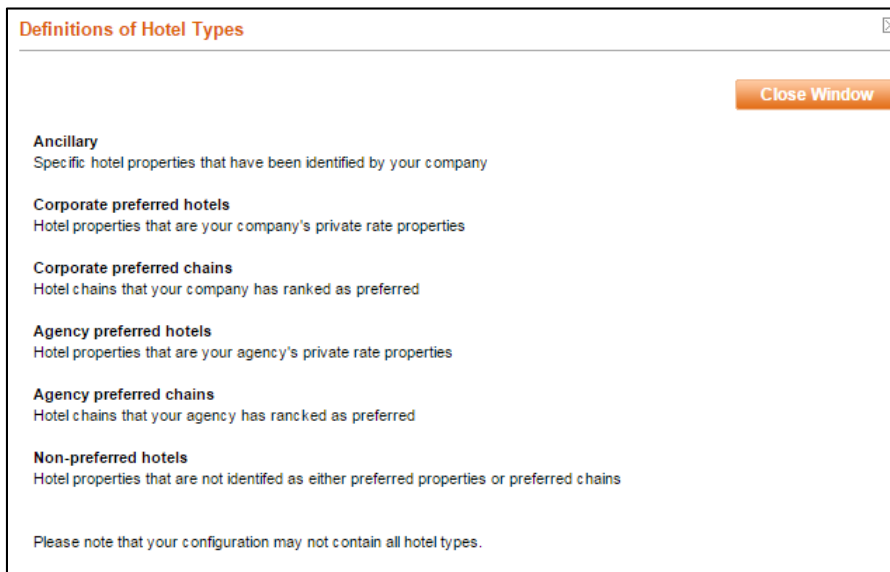
- **Designate behavior the system should use if the rate confirmed at time of booking varies compared to during shopping:**
 - **Continue if fare decreases:** Select the *Yes* or *No* radio button.
 - **If Yes, enter maximum allowed variance amount:** Enter the number and select the currency from the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

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



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

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



- 1 – How many tabs do you want? Select the 1, 2 or 3 radio button.
- 2 – Label the tabs with something your users will understand. They will see the tab labels when making their hotel selections.
- 3 – Check the boxes to select the hotel types for each tab.

- The order of properties can be rearranged later and are shown by using the hotels dropdowns on the left.
- It is recommended at least one tab include "Non-preferred Hotels."

Hotel Shopping Display Configuration

How you want to display Hotel results to your users?

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

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

1. How many tabs do you want?

1 2 3

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

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

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

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

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

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

The screenshot shows a settings page for hotel inventory and search parameters. The settings are as follows:

- Select a method for shopping hotel inventory: Use superdomain setting (dropdown)
- Allow a credit card with expiration date before hotel stay to be used as hotel guarantee? Yes No
- Designate the mileage radius that the system should use when searching for hotels: 60 miles (dropdown)
- Designate the mileage radius that the system should use when searching for reference points: 60 miles (dropdown)
- Select default hotel search radius: 60 (dropdown)
- Display the following message to users when they choose a private rate hotel that can only be booked directly by the travel agency:

We're sorry, but we cannot automatically confirm your hotel when you purchase this itinerary. Your travel agency will be alerted and handle contacting the hotel directly to book your stay. Your hotel will have a system status as on request.
- Select the maximum number of guests allowed per hotel room booking: Use superdomain setting (dropdown)
- Check real-time availability of hotels? Yes No
- Get real-time pricing for hotels? Yes No
- Enable Trip Advisor reviews: Yes (dropdown)
- Trip Advisor Disclaimer:

Entries are not provided by Deem.
- Allow out of policy hotel rooms to be bookable? Yes No

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

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

• **Car Shopping Display Configuration:**

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

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

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

Booking, Change and Cancellation Configuration

Default search form to include flights: Yes No

Default search form to include hotel: Yes No

Default search form to include rental car: Yes No

Select the minimum time required before flight time for booking, and changing airline flights: 4 hours ▾

Select the maximum number of travelers that may be booked on, any airline flights: 3 ▾

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

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

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

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

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

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

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

Enable users to change reservation flights, train, hotels

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

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

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

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

The screenshot shows a configuration page with the following options:

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

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

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

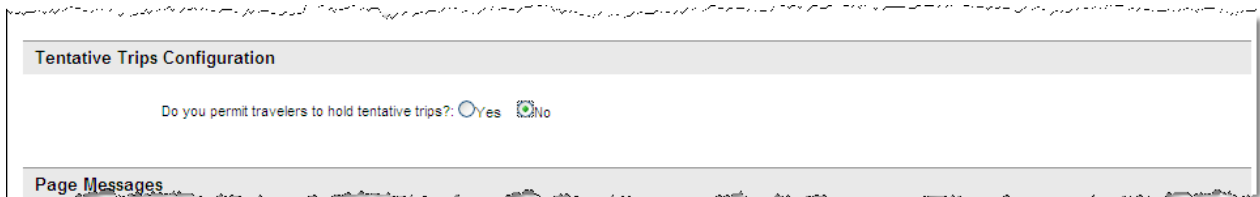
- **Enable users to add air to hotel and / or rental car only trips post booking:** Yes or No.
- **Limit online cancel to only online booked domestic trips where full fare details are available:** Yes or No.
- **Automatically void tickets when an itinerary is cancelled:** Yes or No.
- **Automatically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

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

- **Tentative Trips Configuration:**

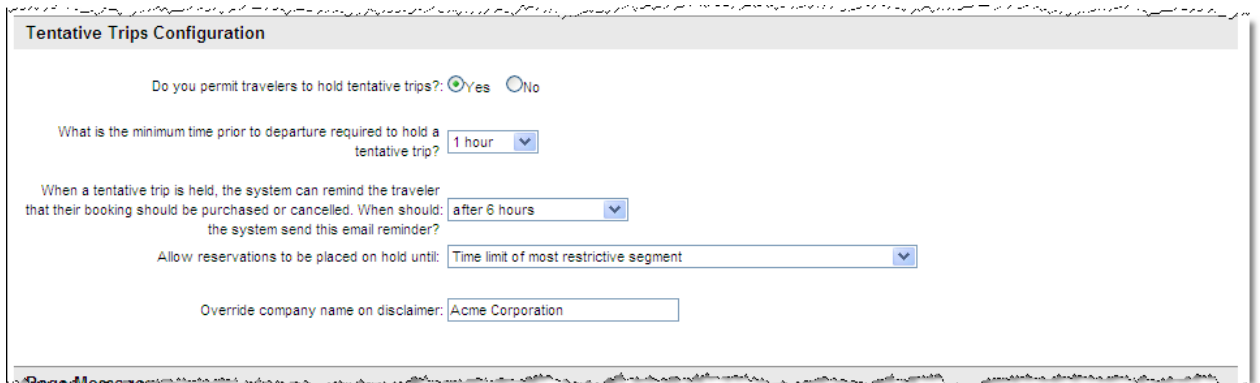
Note: Tentative trips can also be called “Held” trips.

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



The screenshot shows the 'Tentative Trips Configuration' section of a web interface. The title 'Tentative Trips Configuration' is in a grey header. Below it, the question 'Do you permit travelers to hold tentative trips?' is followed by two radio buttons: 'Yes' and 'No'. The 'No' radio button is selected. Below this section is a 'Page Messages' section, which is currently empty.

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



The screenshot shows the 'Tentative Trips Configuration' section with 'Yes' selected for the first question. Below this, there are three more configuration options, each with a dropdown menu:

- 'What is the minimum time prior to departure required to hold a tentative trip?' is set to '1 hour'.
- 'When a tentative trip is held, the system can remind the traveler that their booking should be purchased or cancelled. When should the system send this email reminder?' is set to 'after 6 hours'.
- 'Allow reservations to be placed on hold until:' is set to 'Time limit of most restrictive segment'.

At the bottom, there is a text input field for 'Override company name on disclaimer:' containing the text 'Acme Corporation'.

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

Note: Configuration Team can assist with these messages.

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

Page Messages

Trip Search page:	<pre><p>Questions or Help:</p>
 <p>For online travel support for navigational questions or if you are trying to book a trip that is</pre>
Flight search results:	<pre><p>Helpful Tips:</p>

 <p>Hover over the gold icon for preferred vendor description.</p>

 <p>Please book the same airline roundtrip whenever possible for best</pre>
Train search results:	
Hotel search results:	<pre><p>The Rearden Commerce travel module accesses a rich database of over 87,000 properties that provide details regarding hotel amenities, photographs and even a map of how to find it!</p>

</pre>
Car rental search results:	<pre><p>Hover over the gold icon for preferred vendor description.</p>

 <p>You may change the desired pick-up location of your rental car by selecting "Change search".</p>

</pre>
Change Trip Assistant:	<pre><p>if you are not allowed to CHANGE or CANCEL a portion of your trip on-line, it is because the reservation requires assistance from 4 Test Travel</pre>
Cancel Trip Assistant:	<pre><p>if you are not allowed to CHANGE or CANCEL a portion of your trip on-line, it is because the reservation requires assistance from 4 Test Travel</pre>

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

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

Note: Configuration Team can assist with these messages.

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

The screenshot shows a web interface titled "WebFare Source Messages". It contains four text input fields, each with a label on the left and a text area on the right. The labels are: "Provide a message that will be displayed to the user when they select a web fare option at the Air Search Results page", "Provide a message that will be displayed to the user at the Terms and Conditions page", "Provide a message that will be displayed to the user at the Trip Confirmation page and the Email Notification", and "Provide a message that will be displayed to the user at the Trip Details page". The text areas contain placeholder text: "This flight will be booked directly on the airline website.", "I acknowledge and agree to the airlines terms and conditions.", "This flight has been booked directly on the airline's website. Their rules indicate changes and cancellations must be made with them directly.", and "This flight has been booked directly on the airline's website. Their rules indicate changes and cancellations must be made with them directly.". At the bottom right of the form are "Save" and "Cancel" buttons.

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

2.3.2 Display Configuration Sets

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

2.4 Custom Fields

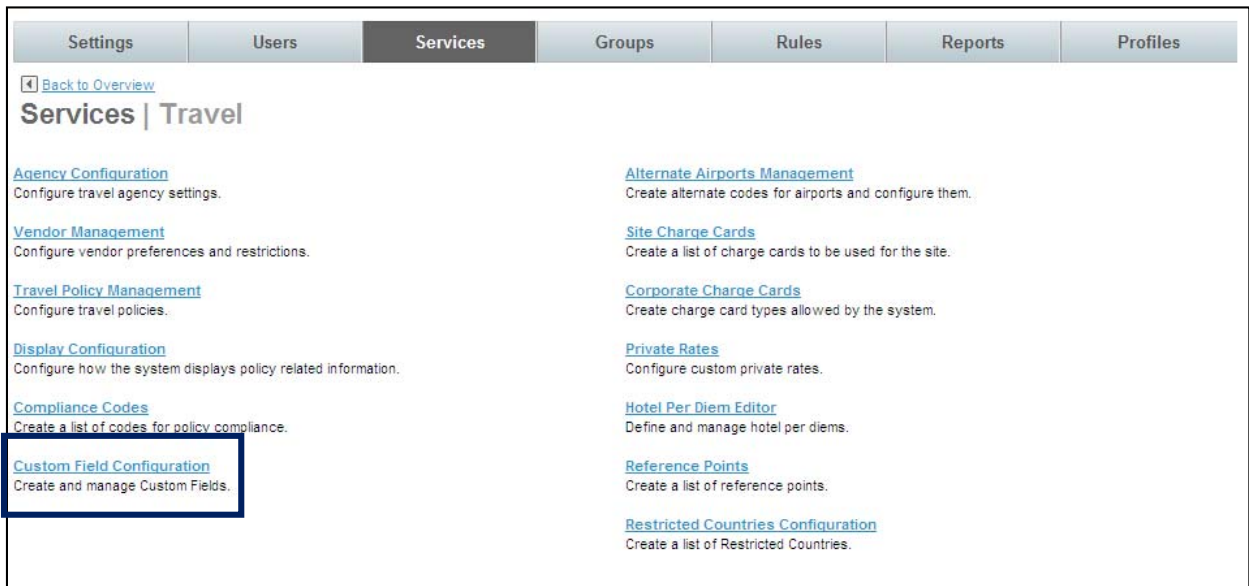
Custom fields are used when agencies require data that is not already being collected by Deem to support either specialized booking or profile requirements. Custom fields can be created using the Deem customizable profile field tool if the field will be used for reporting or by creating a new, custom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

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

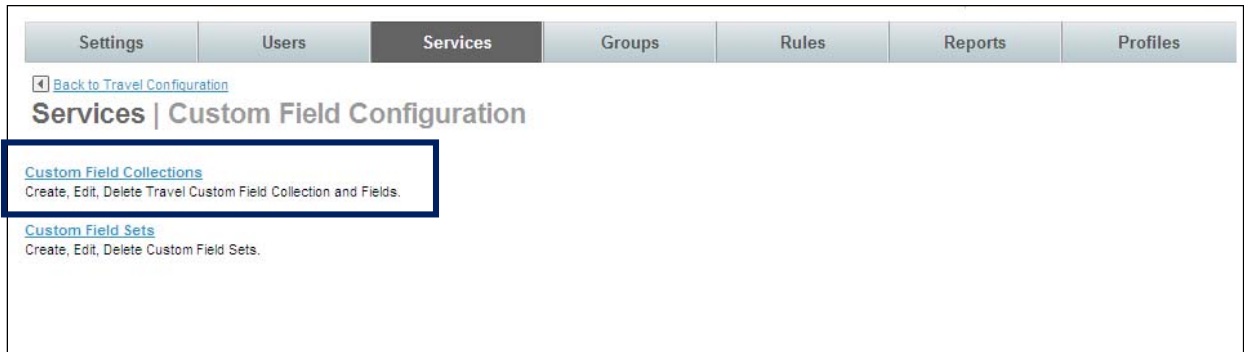
Note: Custom fields are not reportable in our standard reports.

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

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



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



2.4.1 Custom Field Collections

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

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



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

- **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.

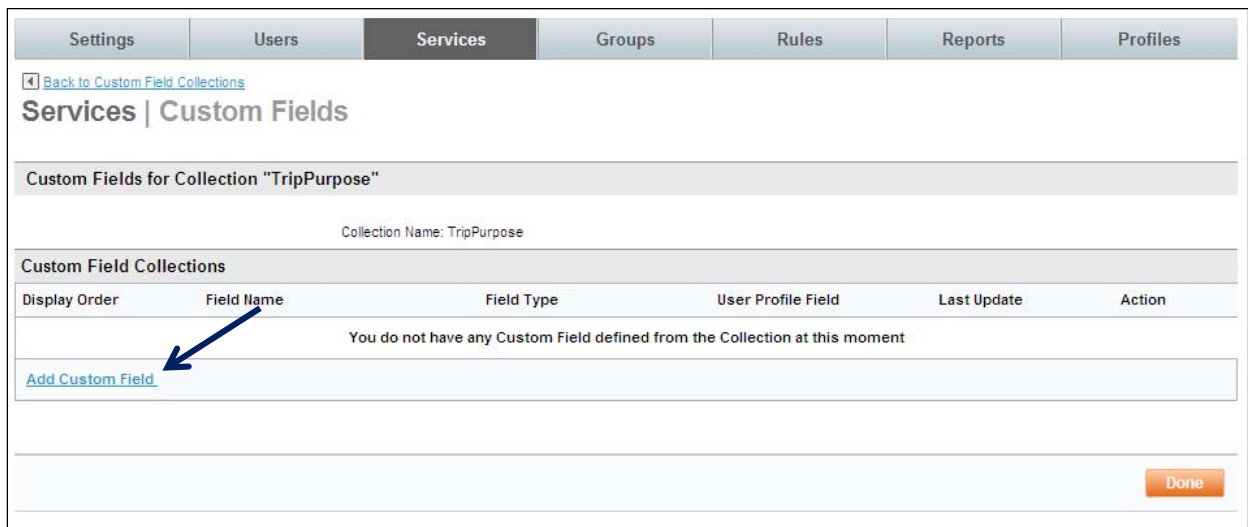
- **Display on Trip Confirmation, Trip Details and eMail Notification Pages:** By selecting this checkbox, the user will see the custom field on the Trip Confirmation, Trip Details and eMail Notification Pages.
- **Include Collection as part of “Change your trip” pages:** By selecting this checkbox,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



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



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

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

- **Field Information:**

- **Name:** Enter a name for this custom field. This is the name the database will use in reference to this field.

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

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

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

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

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

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

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

○ **Field Type Preference – Text**

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

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

○ **Field Type Preference – Checkbox**

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

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

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

Travel | Mandatory Profile Fields

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

Terms & Conditions*

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

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

Field Type Preference

Type: Date Only Time Only Date and Time

Display: Year Month Date Hour Minute Time Zone

Allow a date or time to occur in the past

Date/Time

Year Range: to

Month Range: to

Date Range: to

[Advanced](#)

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

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

○ **Field Type Preference – Number**

Field Type Preference

Type: Number Percentage Currency (in USD)

Decimal Places:

Number

Min Value: (Optional)

Max Value: (Optional)

Default Value: ⓘ (Optional)

[Advanced](#)

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

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

Additional Information

Cost Center*
1234 ⓘ

○ **Field Type Preference – List**

Field Type Preference

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

Option Labels and Values: ⓘ

List (single-select)

Sort labels alphabetically

Default: Select first value as default

Select value prefixed with "" as default

Select no value as default

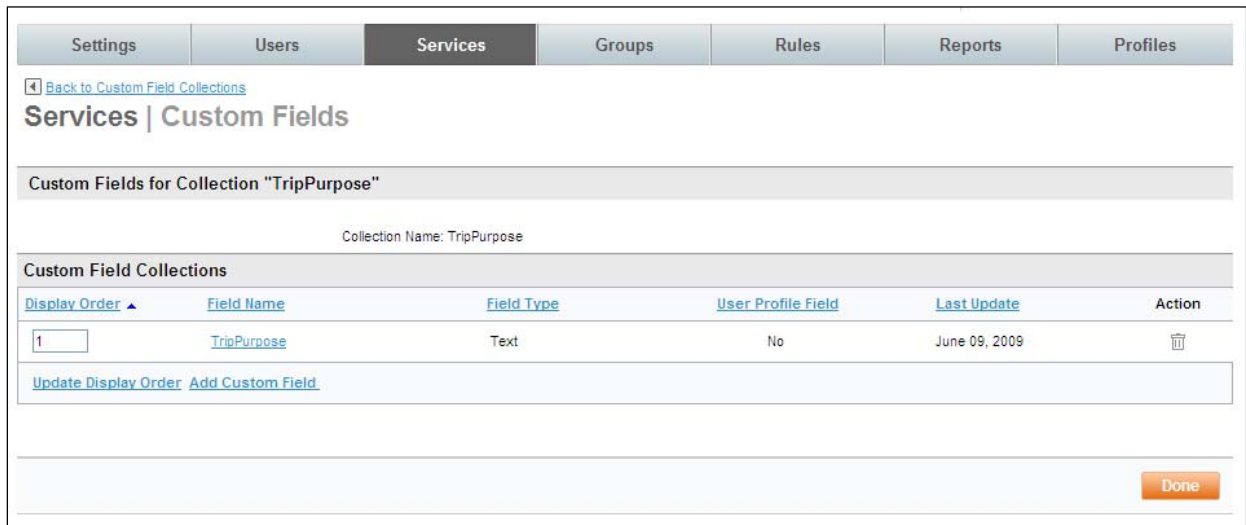
[Advanced](#)

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

An example of this would be the Employee Type.



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



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

2.4.2 Custom Fields Sets

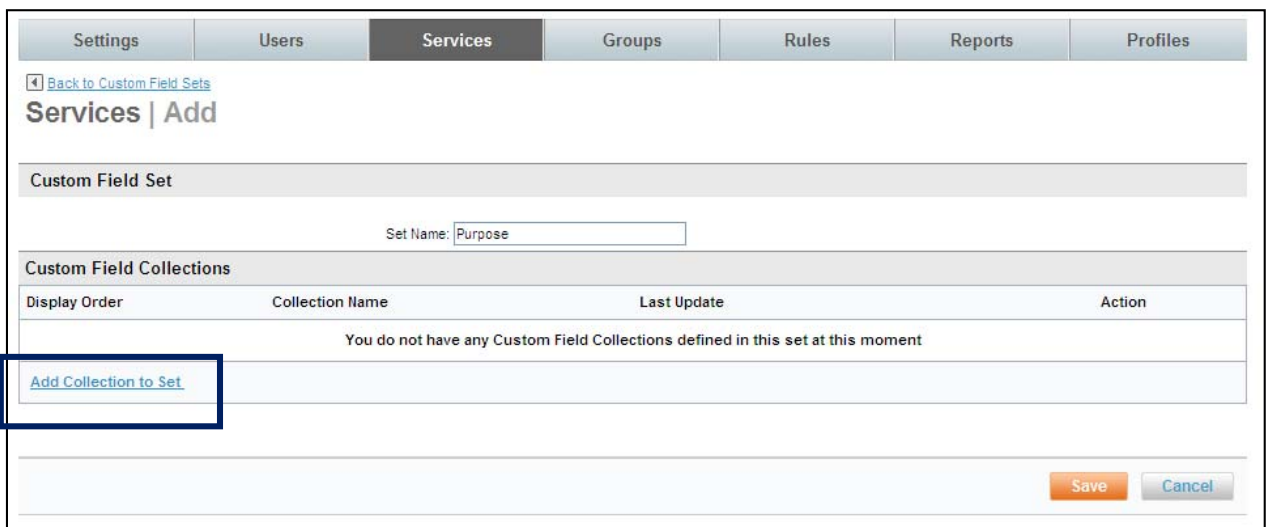
1. Next we will add the Collection to a Set. Click the **Back to Custom Field Configurations** link at the top of the page. The **Services | Custom Field Configuration** page is displayed.



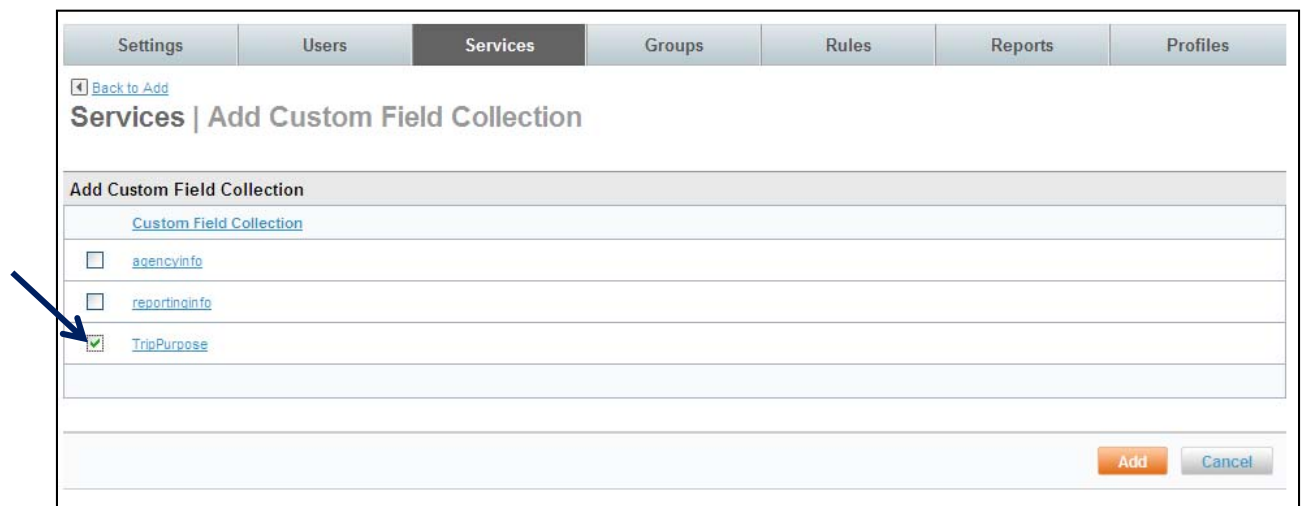
- Click the **Custom Field Sets** link. The **Services | Custom Field Sets** page is displayed.



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



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



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

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

2.5 Restricted Countries

Restricted countries are countries to which travel is either not allowed or if travel is requested, warning messages are displayed.

When a site is cloned from a template, any restricted countries defined on the template will be created on the cloned site.

Configuration can be performed on the Super Domain level to govern all sites within a Domain Group or on the site level for more individual configuration. In most cases, if restricting countries is done on the super domain level, it will have been configured during the implementation process.

2.5.1 Restricted Countries at the Super Domain Level

To configure restricted countries on the Super Domain level:

1. Sign into the Partner Dashboard with an ID and Password with Super Domain permissions. Click the **Configuration** tab then the **Manage Restricted Countries Lists** link.

Configuration | Overview

Profile

Profile Extract Fields Permission
[Manage Profile Extract Fields Permission](#)
[Apply Profile Extract Fields Permission to Domain Groups](#)

Profile Pull Web Service Preferences
[Manage Profile Pull Web Service Subscriptions](#)
 Setup a partner to use the Web Services.
[Manage Profile Pull Web Service Subscription Sets](#)
 Manage sets of WebServices subscription to assign to groups of users.
[Apply Profile Pull Web Service Preferences to Domain Groups](#)

[Test Profile Pull Web Service](#)
 Manually test Web Service requests.
[Download Documentation](#)

Travel Configuration

[Manage Travel Configuration List](#)
 Create, Edit and Delete Travel Configuration.
[Manage Travel Configuration Sets](#)
 Create, Edit and Delete Travel Configuration sets.
[Apply Travel Configuration to Domain Groups](#)

Restricted Countries Configuration

[Manage Restricted Countries Lists](#)
 Create, Edit and Delete Restricted Countries settings.
[Manage Restricted Countries Sets](#)
 Create, Edit and Delete Restricted Countries settings sets.
[Apply Restricted Countries Configuration to Domain Groups](#)

2. The **Configuration | Restricted Countries Lists** page is displayed. Click the **Add Restricted Countries Configuration** link.

[Back to Overview](#)

Configuration | Restricted Countries Lists

Restricted Countries Lists

Restricted Countries Name ▲	# of Countries	Travel Alert	Restricted	Last Update	Copy	X
RCALT	2	Yes		February 11, 2009	Copy	X
RCALTFrance	2	Yes		February 12, 2009	Copy	X
RCListCanada	1	Yes		February 11, 2009	Copy	X
RCListIranIraq	2		Yes	February 12, 2009	Copy	X
RCListPakAfghanCuba	3		Yes	February 10, 2009	Copy	X
XSS Test	1		Yes	February 10, 2009	Copy	X
Add Restricted Countries Configuration						

3. The **Configuration | Edit** page is displayed.

The screenshot shows the 'Configuration | Edit' page for 'Restricted Countries'. At the top, there is a navigation bar with tabs for 'Sites', 'Administrators', 'Groups', and 'Configuration'. Below the navigation bar, there is a link 'Back to Restricted Countries Lists' and the page title 'Configuration | Edit'. The main content area is titled 'Restricted Countries' and contains the following elements:

- Name:** A text input field containing 'XSS Test'.
- Selected Countries:** A list box containing 'Afghanistan'.
- Countries List:** A list box containing 'Albania', 'Algeria', 'American Samoa', 'Andorra', and 'Angola'.
- Buttons:** '< Add', 'Remove >', '<< Add All', and 'Remove All >>'.
- Radio Buttons:** 'Restricted' (selected) and 'Travel Alert'.
- Message to traveler:** A text area containing the message: 'American Express Business Travel has restricted travel between indicated locations. <script>alert()</script>'. Below the text area, it says '142 Characters remaining'.
- Buttons:** 'Save' and 'Cancel' at the bottom right.

4. Complete the page:

- **Name:** Name the configuration
- **Select Countries** from the **Countries List** and click the **Add** button to add them to the Selected Countries box. More than one country may be selected by holding the control key.
- **Restricted / Travel Alert** radio buttons: Select either radio button to either not allow travel at all by selecting the *Restricted* button, or alerting travelers by selecting the *Travel Alert* button.
- **Message to traveler:** Enter a message to be displayed to the traveler if one of the restricted countries is used as a destination country.

5. Click **Save** to save the configuration. Add the **Restricted Countries List** to a **Set**.

6. Click the **Apply Restricted Countries Configuration** to Domain Group to add the Set to a group of Domains.

2.5.2 Restricted Countries at the Site Level

To configure restricted countries on the Site level:

1. From the **Super Domain**, select the **Sites** tab and choose a site from the list.
2. The **Settings** tab is displayed. Click the **Services** tab.
3. The **Services | Overview** page is displayed. Click the **Travel** link in the Travel section of the page.

4. The **Service | Travel** page is displayed. Select the **Restricted Countries Configuration** 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.

5. The **Services | Restricted Countries Configuration Management** page is displayed. Restricted countries follow the List and Set structure.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Travel](#)

Services | Restricted Countries Configuration Management

[Restricted Countries Configuration List](#)
Create, Edit and Delete Restricted Countries Configurations

[Restricted Countries Configuration Sets](#)
Create, Edit and Delete Restricted Countries sets

6. Click the **Restricted Countries Configuration List** link. The **Services | Restricted Countries Configuration List** page is displayed. Click the **Add Restricted Countries Configuration** link to add a new configuration.

Settings Users **Services** Groups Rules Reports Profiles

[Back to Restricted Countries Configuration Management](#)

Services | Restricted Countries Configuration List

Restricted Countries Configuration List

Restricted Countries Name ▲	# of Countries	Travel Alert	Restricted	Last Update	
Restricted Countries	1		Yes	March 30, 2009	Copy

[Add Restricted Countries Configuration](#)

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

- **Name:** Name the configuration
 - Select Countries from the Countries List and click the Add button to add them to the Selected Countries box. Select more than one country by holding the control key.
 - **Restricted / Travel Alert** radio buttons: Select either radio button to either not allow travel at all by selecting the *Restricted* button, or alerting travelers by selecting the *Travel Alert* button.
 - **Message to traveler:** Enter a message to be displayed to the traveler if one of the restricted countries is used as a destination country.
8. Click **Save** to save the configuration. Add the **Restricted Countries List** to a Set.
9. Add the **Restricted Countries** configuration to a Travel Rule for a group of travelers.

2.5.3 Restricted Country Examples

When a country is selected for travel that has been designated as **Restricted**, the traveler will see the below messaging:

Travel

We cannot complete your search. Correct the following entries and resubmit your request.
To/From ([. Change itinerary](#)) **Travel to Egypt is restricted.**
Please contact the Corporate Security Department to discuss alternate arrangements.)

Round Trip **Multi-city** One-way

Flight [Remove](#)

Search by **Price** Schedule Flexible Dates

For low-fare options, enter your search info below. To see all flight options, click the 'Schedule' tab above.

From* [City name or airport](#)
Boston, MA, US (BOS)

To* [City name or airport](#)
Cairo, EG (CAI)

Find flights from nearby airports

Leave* 8/12/15
Wednesday

Return* 8/19/15
Wednesday

Time* Depart: Morning (6am - 12pm)

Time* Depart: Evening (6pm - 12am)

Update your Travel Preferences
Make searching for and booking travel fast and easy.

Travel guidelines

Questions or Help:
For online travel support, please contact ABC Company at 800-555-5555.

Helpful Tips: Please book the same airline roundtrip whenever possible for best fares.

When a country is selected for travel that has been designated as requiring a **Travel Alert**, the traveler will see the below messaging:

Travel | Review your trip

Travel to Lebanon is not recommended due to civil unrest.
Please contact the Corporate Security Department before finalizing travel plans.

Flights

AIRFRANCE

USD \$1,246
per person, complete trip

Flight from: New York, NY (JFK)

Air France 9
Wed, Aug 12 EDT
Depart: 11:25 PM | New York, NY (JFK)
Arrive: 12:35 PM | Paris, France (CDG) (+1 day)
7h 10m (Non-stop) | Restricted Coach
Boeing 777-300
[Choose seats](#) | [Fare Rules](#)

AIRFRANCE

Air France 562
Thu, Aug 13 CEST
Depart: 4:30 PM | Paris, France (CDG)
Arrive: 9:45 PM | Beirut, Lebanon (BEY)
4h 15m (Non-stop) | Restricted Coach
Airbus A340-300
[Choose seats](#) | [Fare Rules](#)

Tools

- [Low fare options](#)
- [See all Flights](#)
- [Checked baggage fees](#)