deem®

Deem Travel Partner Dashboard Training -

Module Three – Travel (Part 2)

Version 17, October 19, 2015 Series

TABLE OF CONTENTS:

1   Module Series Overview

Welcome to Deem's Basic Dashboard Training.

Whether this is an introduction to the Deem Travel 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 covered in the module series classes. The Profiles tab is covered in the Advanced User Data class.

2.1   Travel Policy Management

During the last module we studied Travel Display Configuration which defines what the Deem site will look like for the user and what selections are made available to them.

Travel policy sets the guidelines within which the traveler is expected to book taking into consideration corporate travel policy. Travel policy also defines the consequences if they deviate from policy.
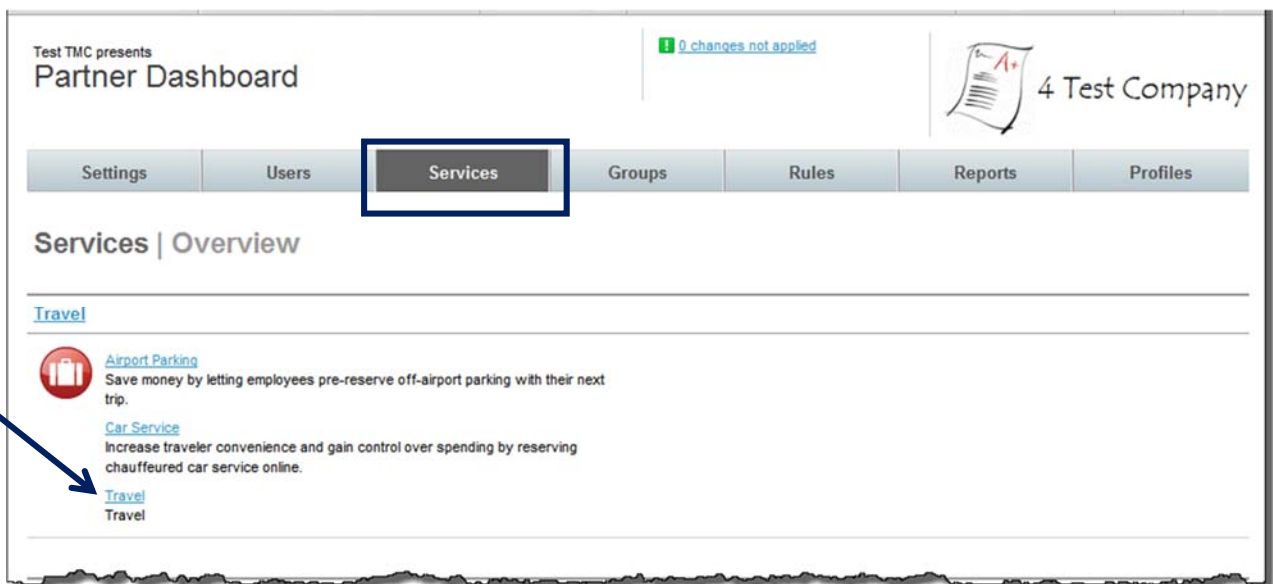
Different policies can be established for different groups; for example the VIP Group vs. Everyone Group or for Domestic Travel vs. International Travel policies. In this section we will learn how to configure these policies.

Note: When a site is cloned from a template, Travel Policies are also cloned. Most policies 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 is displayed. Click the **Travel Policy Management** link.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Overview

Services | Travel

Agency Configuration
Configure travel agency settings.

Vendor Management
Configure vendor preferences and restrictions.

Travel Policy Management
Configure travel policies.

Display Configuration
Configure how the system displays policy related information.

Compliance Codes
Create a list of codes for policy compliance.

Custom Field Configuration
Create and manage Custom Fields.

Alternate Airports Management
Create alternate codes for airports and configure them.

Site Charge Cards
Create a list of charge cards to be used for the site.

Corporate Charge Cards
Create charge card types allowed by the system.

Private Rates
Configure custom private rates.

Hotel Per Diem Editor
Define and manage hotel per diems.

Reference Points
Create a list of reference points.

Restricted Countries Configuration
Create a list of Restricted Countries.

3.   The **Services | Travel Policy Management** page is displayed. Click the **Policy List** link.

Note: The Policy Settings adhere to the List and Set structure.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Travel Configuration

Services | Travel Policy Management

Policy List
Create, Edit and Delete travel policies.

Policy Sets
Create, Edit and Delete sets of travel policies.

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

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Travel Policy Management

Services | Policy List

Policy List

Policy Name ▼	Active	Last Update		
Default Travel Policy	Yes	April 21, 2008	Copy	✖
VIP Travel Policy	Yes	May 20, 2008	Copy	✖
Add A New Travel Policy				

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

- **General Settings**:
  - o **Activate Policy:** Select the checkbox to activate the policy.
  - o **Policy Name:** Name the travel policy. This name should be easily recognizable as a specific travel policy. An example is *VIP Policy* to show that this policy is for VIP travelers or *International Policy* to show the policy is for international travelers.

Note: The *Display Configuration* states what classes of service the traveler will <u>see</u> on the Deem site while the *Travel Policy Configuration* states what the traveler is <u>allowed to select</u> within corporate guidelines.

- **Flight Policy:**

  - o **Enter the maximum allowable difference between the lowest policy compliant airfare and the user's selection**: Enter the fare difference threshold before the selection is marked as out of policy and the unit of measure to use for that value.
  - o **Enter the maximum allowable percentage between the lowest policy compliant airfare and the user's selection**: Enter the most allowable percent difference between what was returned as a compliant trip and the trip selected by the traveler.

Note: If both a maximum allowable difference and percent were entered, another question is asked; how to further handle a difference:

- o **Choose which should be used if both percentage and currency parameters apply**: *Greater* or *Lesser of the two.* If both percentage and amount are used to determine policy, will policy be determined by the greater or lesser of the two? For example, if the lowest cost compliant trip is $1000 with an allowed currency difference set to $100 before it is flagged out of policy and a percentage difference is set to 5% or $50 before it is flagged as out of policy – which will be within policy – the lesser (% or $50 in this case) or the greater (amount difference or $100 in this case)?
- o **Apply lowest policy compliant airfare to unused ticket add collect**: *Yes* or *No.* Apply the new ticket additional collect amount to the original ticket's value for policy compliance.
- o **Enter the maximum allowable airfare change fee / Currency**: In addition to the possible ticket price increase, what is the maximum change fee allowed and in what currency?
- o **Enter the maximum allowable airfare cancellation fee / Currency**: What is the maximum cancellation fee allowed and in what currency?
- o **Enter the minimum advance purchase time range: / Days**: Enter the minimum number days before departure ticket purchase is allowed. Generally set to between 7 and 14 days. The trip would be out of policy if it were booked less than 7 or 14 days before departure date.
- o **Select the earliest limit of the time range that will be used to evaluate policy compliance for itineraries with flights:** Select *Same as group air-search window*, or *1 – 24 hours* in hour increments.
  - By selecting *Same as group air-search window*, the value selected in the Display Configuration question: "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" is used. Generally, *Same as group air-search window is selected.*
  - By selecting *1 – 24 hours*, the setting on the Display Configuration is being overridden.
- o **Select the latest limit of the time range that will be used to evaluate policy compliance for itineraries with flights**: Select *Same as group air-search window*, or *1 – 24 hours* in hour increments.
  - By selecting *Same as group air-search window,* the value selected in the Display Configuration question: "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" is being used. Generally, *Same as group air-search window* is selected.
  - By selecting *1 – 24 hours*, the setting on the Display Configuration will be overridden.
- ▪ **First Class through Premium Coach Class Policy:**

First Class Policy

Travelers are permitted to book first class: ◯Yes ⦿No

Business Class Policy

Travelers are permitted to book business class: ◯Yes ⦿No

Premium Coach Class Policy

Travelers are permitted to book premium coach class: ◯Yes ⦿No

o **Travelers are permitted to book first class:** *Yes* or *No.* If *Yes* was selected:

- **Limit first class to international flights:** Will first class only be allowed if this is an international flight? *Yes* or *No.*
- **Minimum flight time for first class:** What is the length of flight time before a first class ticket would be allowed? Select the *Hours* and *Minutes* from the drop down lists.
- **Apply minimum flight time per flight segment:** *Yes* or *No.* If *No* was selected then will apply to total flight time for connecting flights. Most often *Yes* is selected.
- **Minimum flight distance for first class:** What is the flight distance before a first class ticket would be allowed? Enter the *Number* and select the *Unit of Measure* from the drop down list.

o **Business Class Policy:**
- **Travelers are permitted to book business class:** *Yes* or *No.* If *Yes* was selected:

- **Limit business class to international flights:** Will business class only be allowed if this is an international flight? *Yes* or *No.*
- **Minimum flight time for business class:** What is the length of flight time before a business class ticket would be allowed? Select the *Hours* and *Minutes* from the drop down lists.
- **Apply minimum flight time per flight segment:** *Yes* or *No.* If *No* was selected then will apply to total flight time for connecting flights. Most often *Yes* is selected.
- **Minimum flight distance for business class:** What is the flight distance before a business class ticket would be allowed? Enter the *Number* and select the *Unit of Measure* from the drop down list.

o **Premium Coach Class Policy:**
- **Travelers are permitted to book premium coach class:** *Yes* or *No.* If *Yes* was selected:

- **Limit premium coach class to international flights:** Will premium coach class only be allowed if this is an international flight? *Yes* or *No.*
- **Minimum flight time for premium coach class:** What is the length of flight time before a premium coach class ticket would be allowed? Select the *Hours* and *Minutes* from the drop down lists.
- **Apply minimum flight time per flight segment:** *Yes* or *No.* If *No* was selected then will apply to total flight time for connecting flights. Most often *Yes* is selected.
- **Minimum flight distance for premium coach class:** What is the flight distance before a premium coach class ticket would be allowed? Enter the *Number* and select the *Unit of Measure* from the drop down list.
  - **Cost Reduction Options:**

Note: During the Cost Reductions Options sections the use of *Required* and *Allowed* will be seen. When something is Required, if the traveler makes a selection other than what is stated as Required, the trip will be flagged as out of policy regardless of if the trip was the lowest cost or not. When something is Allowed, the traveler may make a selection and it will not be called out of policy.
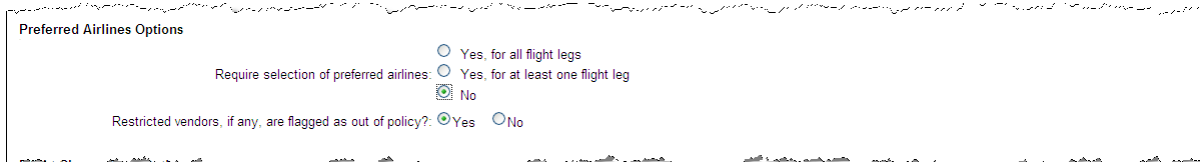
- o **Must travelers always search for lowest available fare:** Select *Yes* or *No* from the drop down list. If *Yes* is selected, the traveler must always search by fare. Any trip displayed as the result of another search method (refundable or non-restricted tickets) will be called out of policy. It is recommended this be set to *Yes.*
- o **Are connecting flights allowed when non-stops are available?** Select *No, Yes, but not required* or *Yes, required when cheaper and when journey time not significantly increased* from the drop down list. Will connecting flights be allowed or required? When *Yes, required when cheaper and when journey time not significantly increased* is selected, the following options are displayed:

Important Note: If *No* is selected, in a market where both connecting and non-stop flights are returned, a traveler must select a non-stop regardless of savings of a connecting flight. If *Yes, but not required* is selected, in a market where both connecting and non-stop flights are returned, a traveler will not be called out of policy regardless of any price difference. It is recommended this be set to *Yes, when cheaper and when journey time not significantly increased*.

When *Yes, when cheaper and when journey time not significantly increased* is selected:

- **Minimum savings required to accept connecting flights:** Enter the amount of savings and select the unit of currency from the drop down list.
- **Maximum time a connecting flight could add to a trip**: Enter the allowed number of whole hours added to a trip by allowing connecting flights.
- **Require connecting flight on same day travel:** Select *Yes* or *No* from the drop down list to require connecting flights when booking travel where the requested departure and return dates are the same.

o **Maximum connecting time required when no non-stops are available:** Select the *Hours* and *Minutes* from the drop down lists.

o **If no flights are available within the maximum connecting time window, what is the next time window (if no flights are available within this time window, then all flights are considered for policy evaluation):** Select the *Hours* and *Minutes* from the drop down lists.

o **Are double connecting flights required to reduce cost?** Select *Yes* or *No* from the drop down lists.

o **Are interline flights required to reduce cost?** Select *Yes* or *No* from the drop down lists.

o **Must travelers select an airline for which there are wholly unused e-tickets:** Select *Yes* or *No* from the drop down list to select a ticket from the unused ticket database.

o **Must travelers select an alternate airport to reduce travel costs:** Select *Yes, any airport returned by the system, Yes, only corporate defined alternate airports* or *No* from the drop down list

- If either Yes, any airport returned by the system, or Yes, only corporate defined alternate airports are selected:

• **If yes, what is the minimum savings to require alternate airport?** Enter the amount of savings and select the unit of currency from the drop down list.

• **Apply policy to alternate airports for:** Select the *Departure, Arrival,* or *Both* radio buttons.
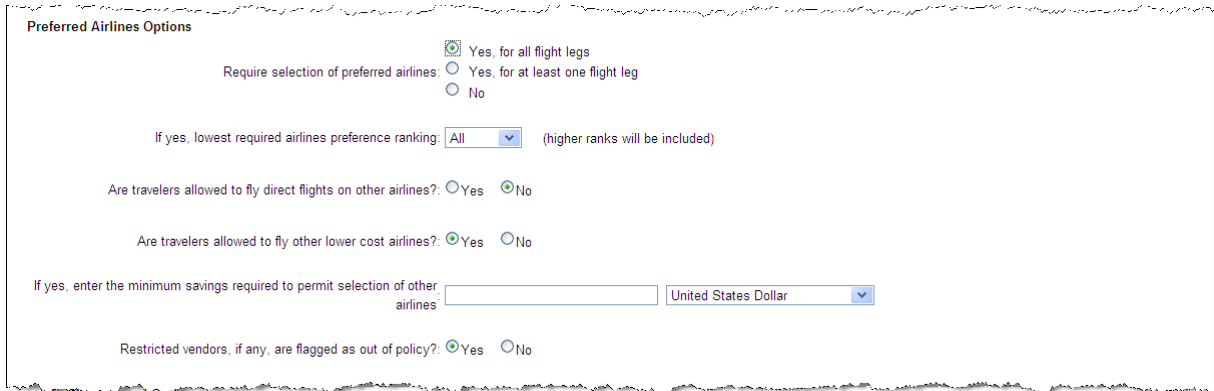
▪ **Preferred Airlines Options:**

Preferred Airlines Options

	◯ Yes, for all flight legs
Require selection of preferred airlines:	◯ Yes, for at least one flight leg
	◉ No
Restricted vendors, if any, are flagged as out of policy?:	◉Yes ◯No

- o **Require selection of preferred airlines:** Select *Yes, for all flight legs*, *Yes, for at least one flight leg* or *No* from the drop down list. If *Yes, for all flight legs, or Yes, for at least one flight leg* was selected from the drop down list:

- - **If yes, lowest required airlines preference ranking:** Select *All, First, Second or Third* from the drop down list. **NOTE:** First equals Most Preferred, Second equals Highly Preferred and Third equals Preferred.
  - **Are travelers allowed to fly direct flights on other airlines:** Select *Yes* or *No* from the drop down list.
  - **Are travelers allowed to fly other lower cost airlines:** Select *Yes* or *No* from the drop down list. (Lower cost airlines refer to non-preferred airlines.)
  - If *Yes* was selected:
    - • **If yes, enter the minimum savings required to permit selection of other airlines**: Enter the amount of savings and select the unit of currency from the drop down list.
- o **Restricted vendors, if any, are flagged as out of policy:** Select *Yes* or *No* from the drop down list. Will restricted airlines marked as out of policy regardless of price, etc. be displayed?
- ▪ **Flight Payment Card Options:**
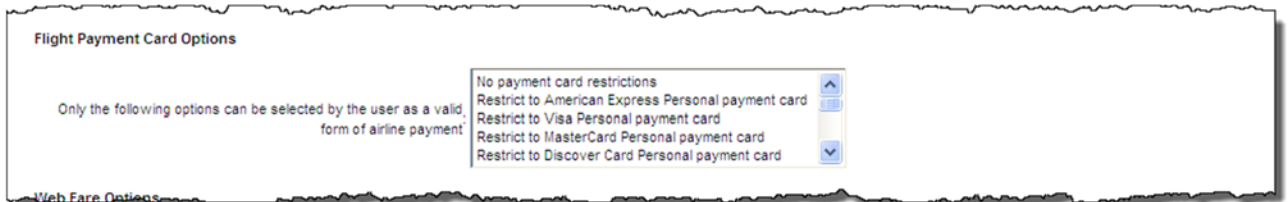
- o **Only the following options can be selected by the user as a valid form of airline payment:** Select *No payment card restrictions* or select a payment card brand from the drop down list. By selecting either a Personal or Corporate card, travel using the card selected will be allowed. Holding the control key allows selection of multiple cards.

Note: If WebFare options are enabled on the Display Configuration, additional options are available.

- **Web Fare Options:** Web fare examples include VMI Baby, Ryan Air and Easy Jet.

- o **Require select of Web Fare airlines**: Select *No, Yes, it is allowed only if the Web fare is cheaper* or *Yes, it is required if the Web fare is cheaper* from the drop down list.
  - If *Yes, if is allowed only if the Web fare is cheaper* was selected:
    - **If yes, what is the minimum savings to allow web fares:** Enter the amount of savings allowed and select the unit of currency from the drop down list.

- **If Yes, it is required if the Web fare is cheaper** was selected:

    - **If yes, what is the minimum savings to require web fares:** Enter the amount of savings required and select the unit of currency from the drop down list.
  - **Allow out of policy trips to be bookable?** The selection made on the Display Configuration is displayed here. *No* will produce a hard stop when an out of policy flight is offered. The Select button will be grayed out and unavailable for selection.
- **Train Policy:**

- o **First Class Policy Travelers are permitted to book first class:** Select *Yes* or *No* from the drop down list.

- o **Business Class Policy Travelers are permitted to book business class:** Select *Yes* or *No* from the drop down list.
- ▪ **Allow out of policy trains to be bookable?** The selection made on the Display Configuration is displayed here. *No* will produce a hard stop when an out of policy rail trip is offered. The Select button will be grayed out and unavailable for selection.
- ▪ **Rental Car Policy:**

Rental Car Policy

Require car rentals for trips with flights: ○ Yes ● No

Maximum Car Size Allowed: Intermediate ▼

Maximum daily Rental Car rate allowed: 67   United States Dollar ▼

Require selection of preferred car vendor: ○ Yes ● No

Restricted vendors, if any, are flagged as out of policy?: ● Yes ○ No

Out of policy car types:
```
2-3 Door
2/4 Door
4-5 Door
Wagon/Estate
Passenger Van
```

Mark hybrids as out of policy: ○ Yes ● No

Allow out of policy rental cars to be bookable?: ● Yes ○ No (*This is now a part of Display Configurations.*)

- o **Require car rentals for trips with flights:** Select *Yes* or *No* from the drop down list.
- o **Maximum Car Size Allowed:** Select *None, Compact, Economy, Full Size, Intermediate, Luxury, Mini, Premium*, or *Standard* from the drop down list.

Note: A default car size can be set on the user profile but what is allowed within policy is defined here. If no car size is set on the user profile, the default value on the user profile is *Intermediate.*

- o **Maximum daily Rental Car rate allowed:** Enter the maximum amount for a daily car rental charge if appropriate and select a currency from the drop down list.

Note: A weekly rate will be divided by 7 to compare the rate to the maximum allowed daily rate.

- o **Require selection of preferred car vendor**: Select either the *Yes* or *No* radio button to require the selection of a preferred car vendor or not.
- o **Restricted vendors, if any, are flagged as out of policy?** Select *Yes* or *No* from the drop down list to flag a restricted vendor as out of policy or not.
- o **Out of policy car types:** Select and appropriate car type including *2-3 Door, 2/4 Door, 4-5 Door, Wagon / Estate, Passenger Van, Sport, Coupe, SUV, Crossover, Monospace, Roadster, Pickup Regular Car, Pickup Extended Cab,* or *Convertible* from the drop down list to flag that car type as out of policy.
- o **Mark hybrids as out of policy**: Select Yes or No from the drop down list to flag a hybrids as out of policy or not.
- o **Allow out of policy rental cars to be bookable?** The selection made on the Display Configuration is displayed here. *No* will produce a hard stop when an out of policy rental car is offered. The Select button will be grayed out and unavailable for selection.

- **Hotel Policy:**

- o **Require hotel reservations for all overnight trips:** Select *Yes* or *No* from the drop down list.
- o **Require user to select properties with private rates:** Select *Yes* or *No* from the drop down list. Private rate hotels are specific properties where discounted rates have been established with that one, specific property and will be listed above any Preferred Hotel Chain on the results page. Private rates can be uploaded into the Partner Dashboard or entered using the Private Rates link found under Services | Travel.
- o **Require user to select properties with preferred hotel chains:** Select *Yes* or *No* from the drop down list. Preferred hotels are entered in the Preferred Vendor section of the Partner Dashboard. Preferred hotels are ranked Most Preferred, Highly Preferred and Preferred and displayed to the traveler in that order. They would be displayed below Private Rate properties on the results page.
- o **For private rate hotels, limit room rate to private rate rooms only:** Select *Yes* or *No* from the drop down list. If a different, non-private rate type of room is available (double for example), will the private rate room in the private rate hotel be allowed. By selecting *Yes*, if no rooms with a private rate are available, any choice at the hotel will be out of policy. By selecting *No*, any room would be considered within policy.
  - If *Yes* is selected, **If private rate rooms are not available, allow room rates up to per diem** field is displayed.

- o **Limit room price to company per diem, if available:** Select *Yes* or *No* from the drop down list. Company per diem room prices are defined BY CITY on the Travel tab under the *Hotel Per Diem Editor* link. By selecting *Yes,* the traveler will be called out of policy if the selected rate is higher than the per diem as defined in the Hotel Per Diem link.
- o **Maximum Room Rate when company per diem is not available or available but not enforced:** Enter the room rate and select a currency from the drop down list when the per diem is not available or is not enforced by the question above.

Note: If *No* was selected above in *Limit room price to company per diem, if available,* the rule is considered to be not enforced.

- o **Select one or more restricted room types:** Select *No Restrictions, Do not permit Suites, Do not permit Superior rooms, Do not permit King rooms, Do not permit Queen rooms,* or *Do not permit double rooms* from the drop down list. Be especially careful when limiting the room type – In all suite type properties, the room may be considered out of policy when in fact it may not be.
- o **Restricted vendors, if any, are flagged as out of policy?** Select *Yes* or *No* from the drop down list.
- o **Allow out of policy hotels to be bookable?** The selection made on the Display Configuration is displayed here. *No* will produce a hard stop when an out of policy hotel is offered. The Select button will be grayed out and unavailable for selection.
- **Itinerary Parameters (optional):** Markets can be restricted by date, city and airport.

Note: International flight policy or travel to a convention can be configured in the Itinerary Parameters section by selecting originating or terminating countries from the drop down lists.

- o **Select the start and end dates to which this policy applies**: Select the *Start* and *End* dates from the drop down lists if the policy will not be put in place upon saving of the record or will end within a time period.
- o **Enter one or more airport codes separated by semicolons or select one or more state or country to which this policy will be applied.** The policy will apply to all itineraries originating from the entered / selected locations: Select the *From Location: by airport codes, by states, by countries* or *anywhere* radio buttons and then enter the airport code.
  - If *by airport codes* was selected, enter the airport codes separated by semi-colons

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

Enter one or more airport code separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries orignating from the entered/selected locations.

From Location: ○ by airport codes ⦿ by states ○ by countries ○ anywhere

```
Alaska
Alabama
Arkansas
Arizona
California
```

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

Enter one or more airport code separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries orignating from the entered/selected locations.

From Location: ○ by airport codes ○ by states ⦿ by countries ○ anywhere

```
Afghanistan
Albania
Algeria
American Samoa
Andorra
```

- If *anywhere* was selected, no additional selections are needed.
- o **Enter one or more airport codes separated by semicolons or select one or more state or country to which this policy will be applied. The policy will apply to all itineraries terminating in the entered / selected locations:** Select the *To Location: by airport codes, by states, by countries* or *anywhere* radio buttons and then enter the airport code.
  - If *by airport codes* was selected, enter the airport codes separated by semi-colons, similar to From Location above.
  - If *by states* was selected, select the state(s) from the drop down list similar to From Location above.
  - If *by countries* was selected, select the state(s) from the drop down list similar to From Location above.
  - If *anywhere* was selected, no additional selections are needed.
- o **Bi-directional:** Select *Yes* or *No* from the drop down list.
- o **Enter one or more airport codes separated by semicolons or select one or more state or country to which this policy will be applied.** Select the *Through Location: by airport codes, by states, by countries* or *anywhere* radio buttons and then enter the airport code.
  - If *by airport codes* was selected, enter the airport codes separated by semi-colons similar to From Location above.
  - If *by states* was selected, select the state(s) from the drop down list similar to From Location above.
  - If *by countries* was selected, select the state(s) from the drop down list similar to From Location above.
  - If *anywhere* was selected, no additional selections are needed.

- **Policy Message:**

Note: These messages will clone from the site template and may only need modification.

- o **Non Compliant message displayed to the traveler:** Enter exact text to be displayed to the non compliant traveler on the travel page. Be sure to not use travel lingo or HTML tags.
- o **Non Compliant message displayed on confirmation emails:** Enter exact text to be included in the email to the non compliant traveler. Be sure to not use travel lingo or HTML tags.
- o **Non Compliant message displayed to the travel authorizer:** Currently not in use.
- o **Pre-trip authorization message displayed to the traveler:** Currently not in use.
- o **Pre-trip authorization message displayed to the travel authorizer:** Currently not in use.
- ▪ **Policy Behavior:**

- o **Select a system behavior for non-compliant trips:** Select *Collect compliance information only, Require user to explain non-compliant trip, Require user to validate pre-approval for non-compliant trip, Require user to request permission for non-compliant trip,* or *Require user to reselect compliant trip* from the drop down list.
  - - If *Collect compliance information only* is selected, the traveler will not be informed their selections are out of policy, but the selection will be collected and be made available for reports.

- *Require user to reselect compliant trip* will result in a hard stop and not permit the traveler to book their selections. They must return to the search page and begin again.
- *Require user to explain non-compliant trip* is used most often. If selected: A list of *Compliance Codes* would be displayed for selection and

Policy Behavior

Select a system behavior for non-compliant trips: Require user to explain non-compliant trip

Require user to provide purpose of trip?: ○ Yes ⦿ No

Host Agency

- **Require user to provide purpose of trip?** Select *Yes* or *No* from the drop down list. If *Yes* is selected:

  Label for Purpose of Trip Field: Enter the text to be displayed above the Purpose of Trip field.

Policy Behavior

Select a system behavior for non-compliant trips: Require user to explain non-compliant trip

Require user to provide purpose of trip?: ⦿ Yes ○ No

Label for Purpose of Trip Field: Purpose of trip

Host A

Note: Require user to validate pre-approval for non-compliant trip and Require user to request permission for non-compliant trip are not currently used.

- **Host Agency:**

Host Agency

Enter the pseudo city code where a non-compliant booking will be queued

Pseudo city code: [   ] (Optional: will override agency settings)

Enter the queue designation where a non-compliant booking will be queued

Queue: [   ] (Optional: will override agency settings)

Save   Cancel

Note: Typically Queue Delivery Options is used, not Host Agency.

o **Enter the pseudo city code where a non-compliant booking will be queued**. Enter the pseudo city code if the agency configuration PCC will not be used. The booking will not fall into the default pseudo city code queue.
o **Enter the queue designation where a non-compliant booking will be queued.** Enter the queue if the agency configuration queue will not be used. The booking will not fall into the default pseudo city code queue.

6. Click **Save** to save the travel policy.   The **Service | Policy List** page is redisplayed. Click the **Back to Travel Policy Management** link.
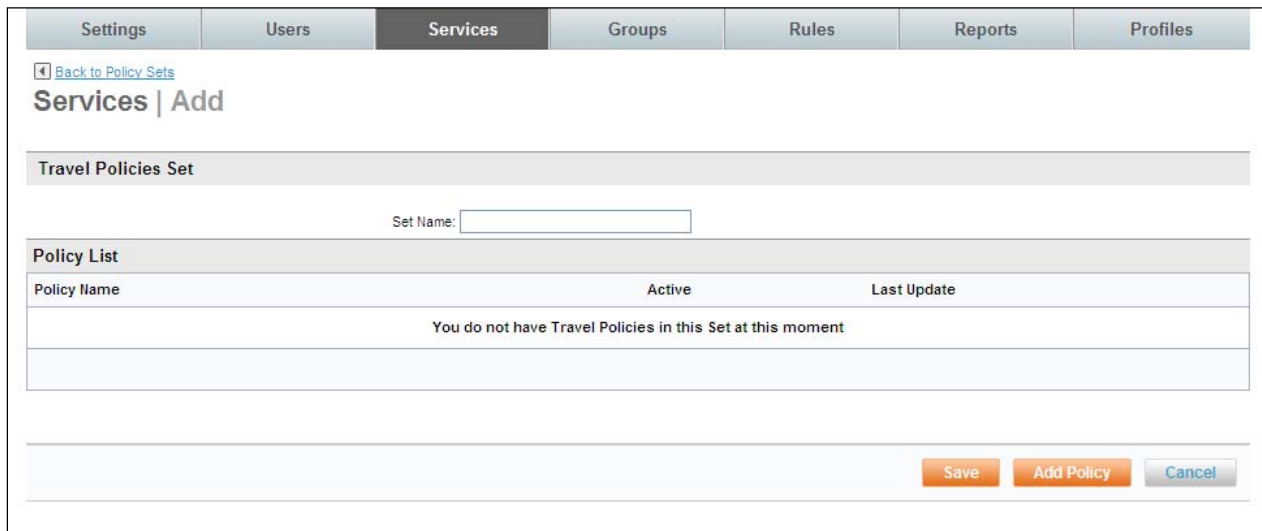

7. The **Services | Travel Policy Management** page is displayed. To add the new Travel Policy to a Set, click **Policy Sets** link.

8. The **Services | Policy Sets** page is displayed. Click the **Add A New Travel Policy Set** link or click the link below an existing set to add to or view it.
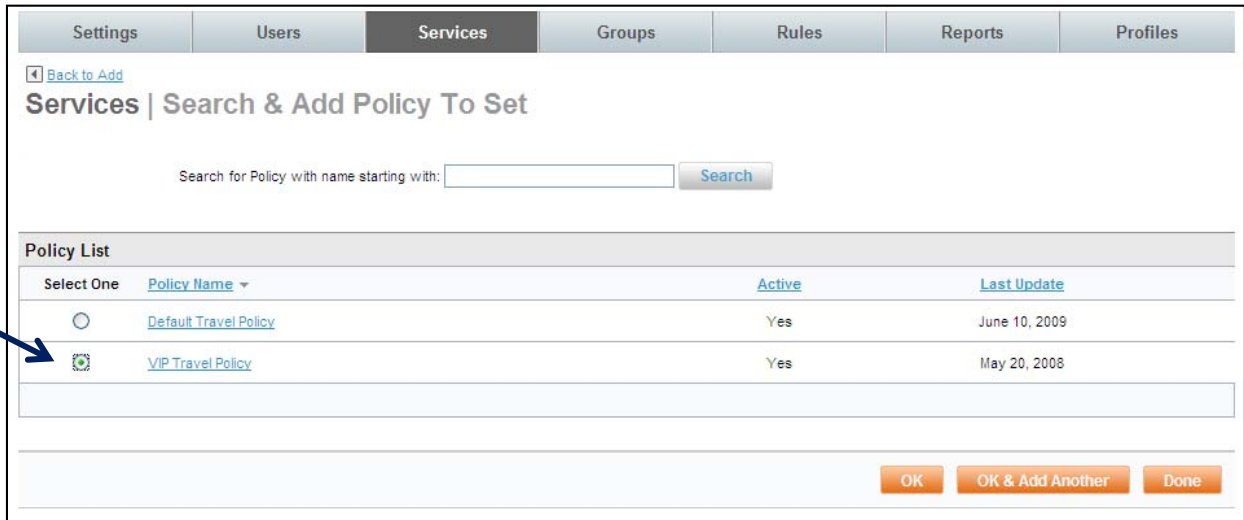

9. The **Travel Policy Set** page is displayed.

- **Set Name:** Name the Travel Policy Set. This name should be easily recognizable as a specific Travel Policy configuration. An example is *VIP Travel Policy Set* to show that this set is for VIP travelers.

10. Click the **Add Policy** button. The **Services | Search & Add Policy To Set** page is displayed.

11. Select the radio button beside the list name of the policy to add it to the set.

12. Click **OK**. Only one policy list can be added to the set to avoid policy conflicts. The **Services | Add** page is redisplayed.

13. Click **Save** to save the travel policies in the set.

14. Click the **"_ changes not applied"** link to view changes not committed.

15. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.

2.2 Compliance Codes

Compliance Codes are displayed to the user for selection when their travel plans are out of policy. Generally, the ticketing travel agency provides codes to Deem consistent with what is used for agency bookings. The code is loaded into the PNR string and is available for reporting by the agency.

Each element of a trip will display the associated list of *Compliance Codes* for out of policy travel. At least one compliance code for each element must be loaded. If the agency does not use an element – Train, for example – a fictitious compliance code must be added for Train.

Note: When a site is cloned from a template, *Compliance Codes* are also cloned. Most codes 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 is displayed. Click the **Compliance Codes** link.
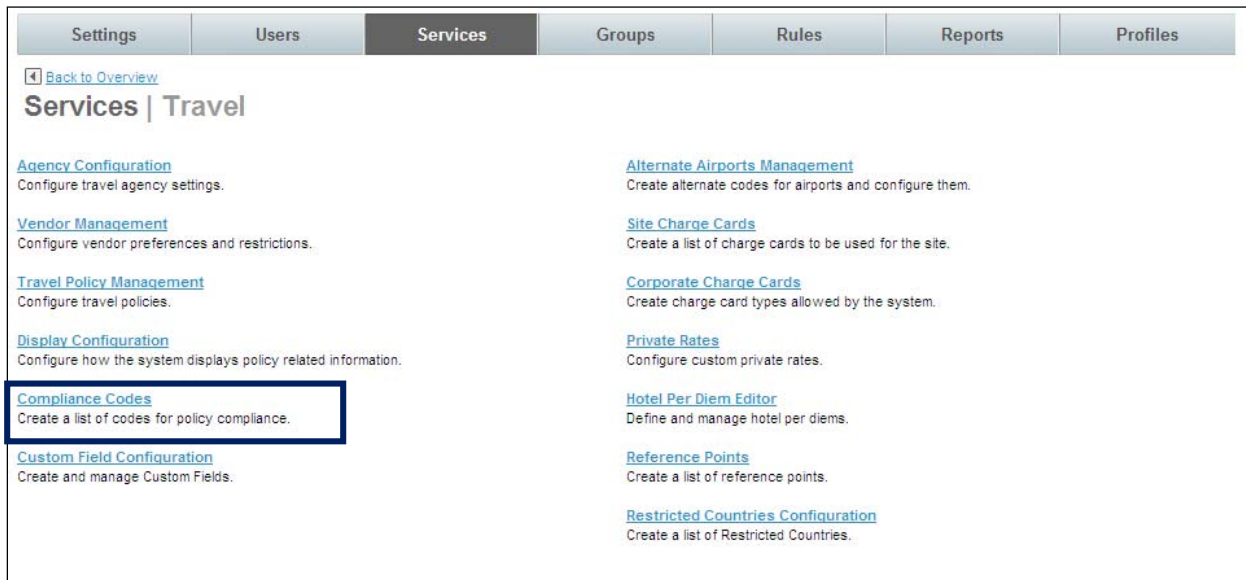
3. The **Services | Compliance Codes Management** page is displayed. Click the **Compliance Codes List** link.

Note: The *Compliance Codes* adhere to the List and Set structure.

4. The **Services | Compliance Codes List** page is displayed. Click the **Add A New Compliance Code** link to add a new code, or click an existing code record to edit that record.

Note: One code for each type is required. If one type is not used, create one named "dummy" or something similar. One of each type is needed to save a travel rule.

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

- ▪ **Compliance Codes for Policy Handling:**
  - o **Activate Code:** Select the checkbox to activate the code
  - o **Code:** Enter a code name. The code can be alphanumeric but may not contain special characters. This code is placed in the PNR string and is not displayed to the traveler. A code can be used multiple times as long as the Type for each is different.
  - o **Display Reason Text:** Enter easily understandable text to be displayed to the user for selection when the travel plans are out of policy. This text has a limit of 100 characters and should not contain HTML tags or industry lingo.
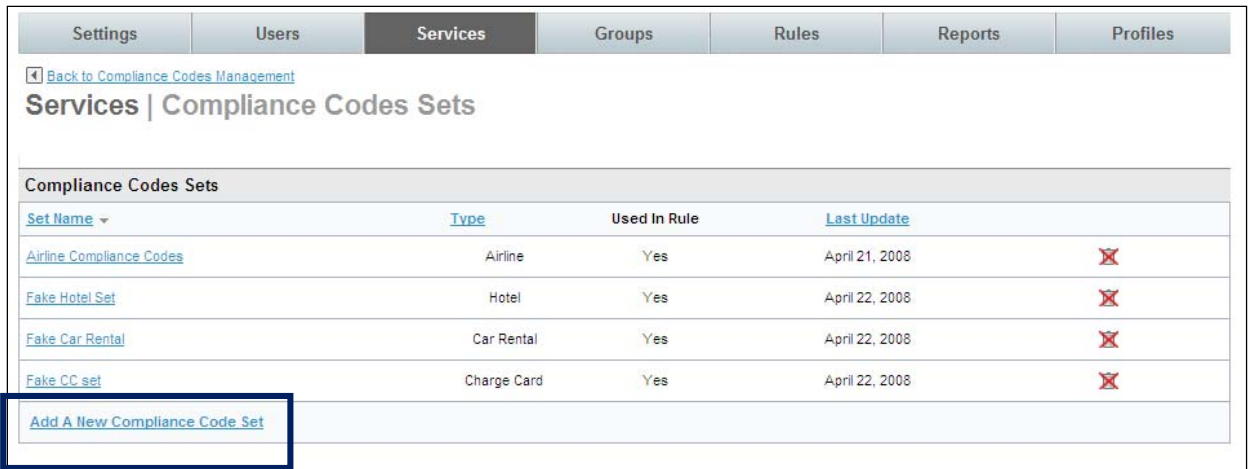 - o **Type:** Select Airline, Car Rental, Payment Card, Hotel or Train from the drop down list.

6. Click the **Save** to save the code. The **Services | Compliance Codes List** page is redisplayed. Click **Back to Compliance Codes Management** link.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Compliance Codes Management

Services | Compliance Codes List

7. The **Services | Compliance Codes Management** page is redisplayed. Click the **Compliance Codes Sets** link to add the Compliance Code list item to a set.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Travel Configuration

Services | Compliance Codes Management

Compliance Codes List
Create and Edit travel compliance codes.

Compliance Codes Sets
Create, Edit and Delete sets of travel compliance codes.
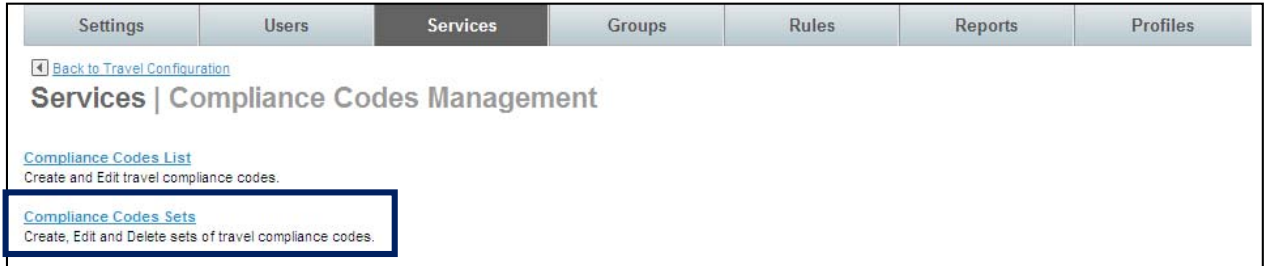
8. The **Services | Compliance Codes Set** page is displayed. Click the **Add A New Compliance Code Set** link to add a new set, or click an existing set record to edit that record.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Compliance Codes Management

Services | Compliance Codes Sets

Compliance Codes Sets

Set Name ▾	Type	Used In Rule	Last Update	
Airline Compliance Codes	Airline	Yes	April 21, 2008	✖
Fake Hotel Set	Hotel	Yes	April 22, 2008	✖
Fake Car Rental	Car Rental	Yes	April 22, 2008	✖
Fake CC set	Charge Card	Yes	April 22, 2008	✖
Add A New Compliance Code Set				

Note: One code for each type is required. If one type is not used, create one named "dummy" or something similar. One of each type is needed to save a travel rule.

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

- ▪ **Set Name:** Name the Compliance Code Set. This name should be easily recognizable as a specific Compliance Code configuration. An example is *Airline Compliance* Code *Set* to show that this one is for Airline Compliance Codes.
- ▪ **Type:** Select *Airline, Car Rental, Payment Card, Hotel or Train* from the drop down list,

10. Click the **Add Code** button. The **Services | Add Code To Set** page is displayed.

11. Select the radio button beside the **Compliance Code List** name to add it to the set.

12. Click **OK** if there is only one code to add, or click the **OK & Add Another** if others are needed to add to the set. The **Services | Add** page is redisplayed.

13. Click the **Save** button to save the new Compliance Code Set and apply your changes by clicking the **"_ changes not applied"** link to commit the changes.

14. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.

2.3 Vendor Management

Preferred and restricted vendors are identified within the Vendor Management section of the Services | Travel Tab. Preferred and restricted vendors can be included within the search results, or segregated out

depending on how they are configured. They can be specific to a location or set up to be global or worldwide.

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

2.3.1 Vendor Management List Items

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

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 **Vendor Management** link.
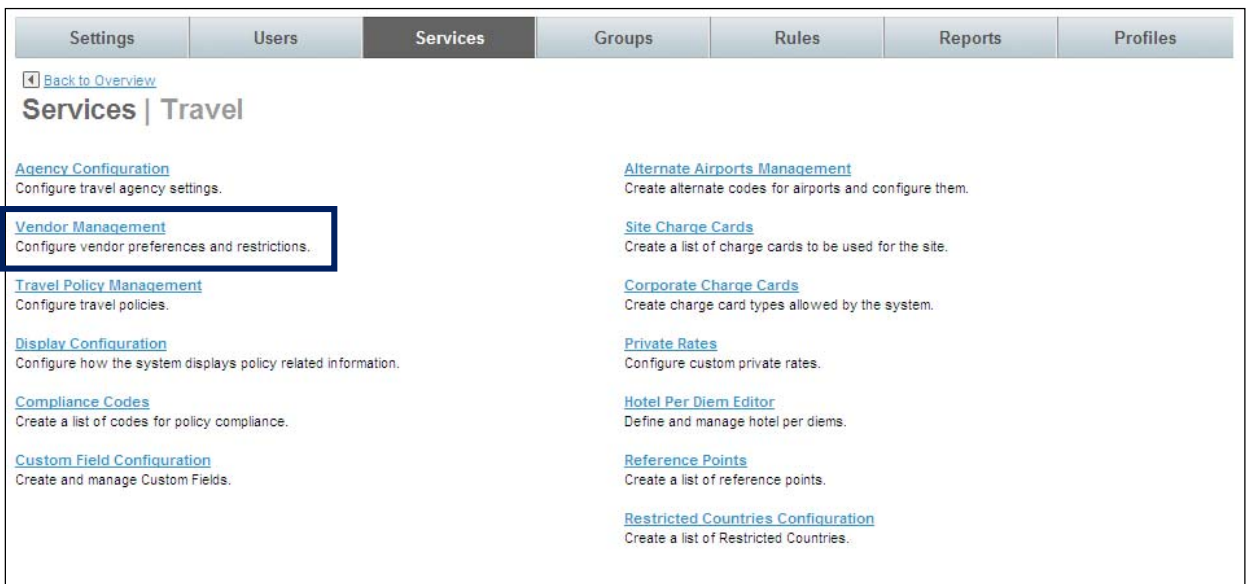
3. The **Services | Vendor Management** page is displayed.

2.3.1.1   Airline Preferences

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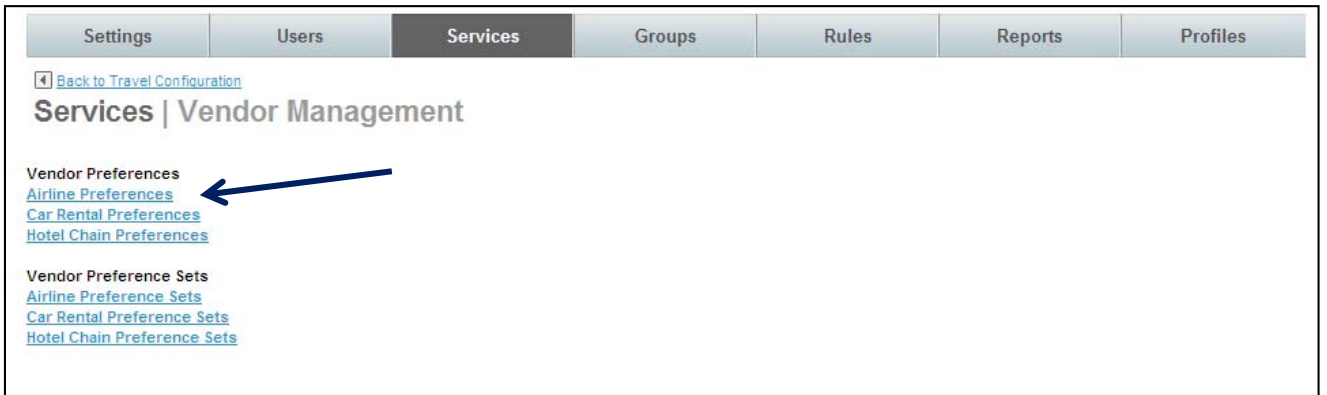
2. The **Services | Airline Preferences** page is displayed. Click the **Add A New Airline Preference** link to add a new preference, or click an existing preference record to edit that record.

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

- **Airline Preferences:**

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

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

Location Preferences

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

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

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

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

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

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

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

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

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

2.3.1.2   Car Rental Preferences

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

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

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

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

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

Location Preferences

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

Separate multiple airport codes or city names with semicolons.

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

[_____] Airport Code

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

Location Preferences

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

Separate multiple airport codes or city names with semicolons.

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

Alaska
Alabama
Arkansas
Arizona
California

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

Location Preferences

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

Separate multiple airport codes or city names with semicolons.

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

Afghanistan
Albania
Algeria
American Samoa
Andorra

Current Selection is: United States

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

Location Preferences

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

Separate multiple airport codes or city names with semicolons.

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

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

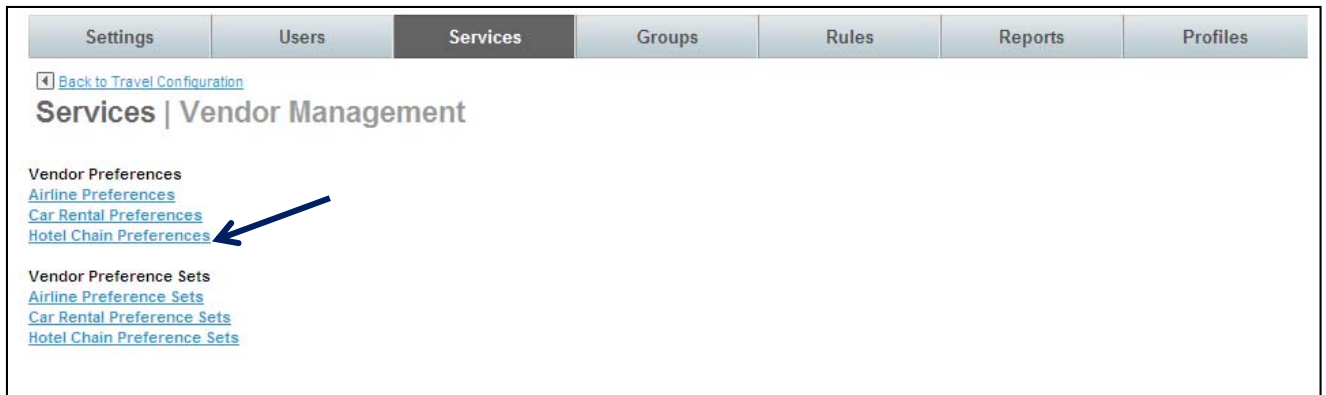4. Click the **Save** to save the new Car Rental Preference.

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

2.3.1.3 Hotel Chain Preferences

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

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

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

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

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

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

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

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

o **Preferred Hotel Chains:**
- **Most Preferred Hotel Chain:** List the hotel chain codes to have them displayed on the search results page. <mark>PREFERRED</mark> will be placed beside this entry and when hovering over the label, a box describing this property as a Most Preferred Hotel Chain is displayed.
- **Highly Preferred Hotel Chain:** List the hotel chain codes to have them displayed on the search results page. <mark>PREFERRED</mark> will be placed beside this entry and when hovering over the label, a box describing this property as a Highly Preferred Hotel Chain is displayed.
- **Preferred Hotel Chain:** List the hotel chain codes to have them displayed on the search results page. <mark>PREFERRED</mark> will be placed beside this entry and when hovering over the label, a box describing this property as a Preferred Hotel Chain is displayed.
- **Flag the Preferred Hotels as Preferred:** If *Yes* is selected, the search results will be displayed as outlined above (Most Preferred followed by Highly Preferred and then Preferred Hotels) and <mark>PREFERRED</mark> will be displayed beside the hotel chain information. When hovering over the label, a box describing this as a Most Preferred Hotel Chain, Highly Preferred Hotel Chain or Preferred Hotel Chain is displayed.

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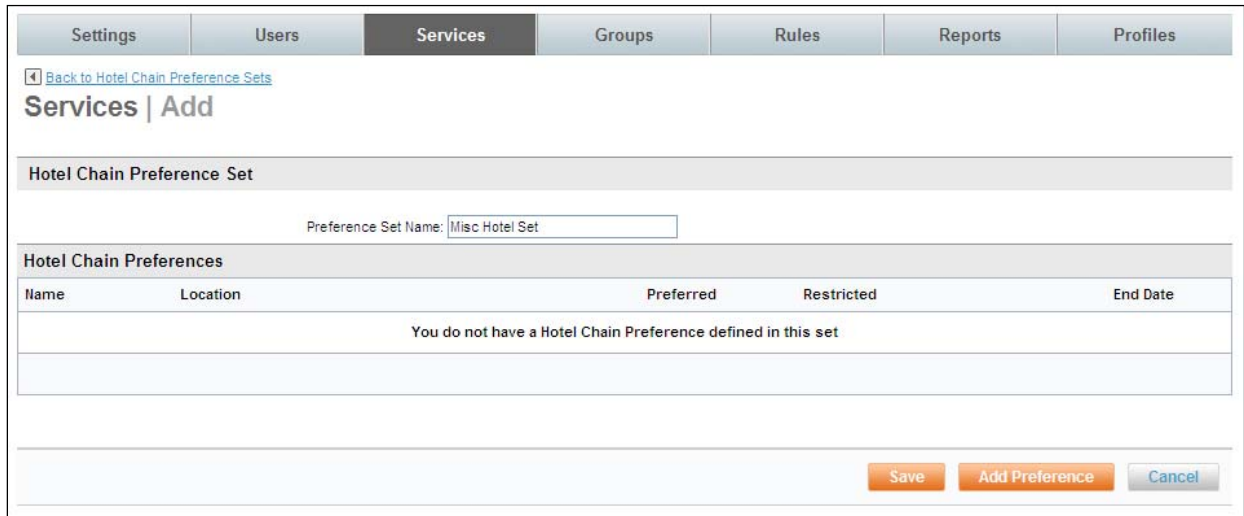
4. Click the **Save** to save the preferences. Click the **Back to Vendor Management** link to return to the **Vendor Management** page.

2.3.2 Vendor Management Sets

1. Click the **Vendor Preference Sets** link to add the Preference list to a set. Select the appropriate vendor type's link.

2. The Services | (Airline, Car Rental or Hotel Chain) Preference Sets page is displayed. Click the Add A New (Airline, Car Rental or Hotel Chain) Preference Set link to add a new set, or click an existing set record to edit that record.
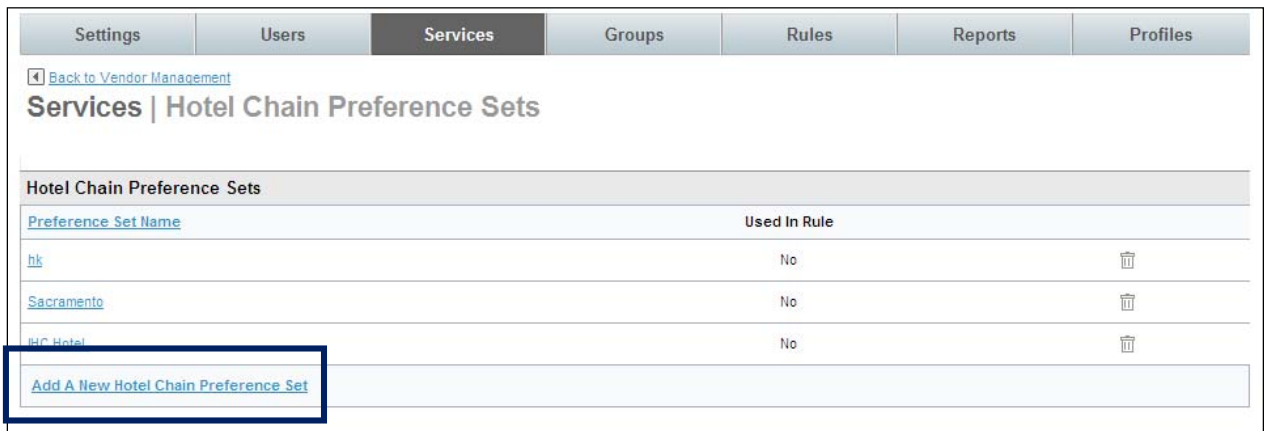
3. The (Airline, Car Rental or Hotel Chain) Preference Set page is displayed.

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

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

5. Select the radio button beside the Preference List name to add it to the set. Click **OK** if there is only one list to add, or click the **OK & Add Another** if others need to be added to the set. Click **Save** to save the preferences in the set.

6. Click the **"_ changes not applied"** link to review the changes.

7. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.

2.4 Private Rates

Private Rates are discounted rates negotiated by the corporate client or the travel agency. All vendor types (air, car, and / or hotel) may offer private rates and have varying terms for compliance. Private rate elements will be placed at the top of the list when search results are displayed.

This page is needed infrequently. When needed, it defines individual rate codes that have been issued, but are not being properly displayed in the GDS. Enter a ticket if the need arises for this configuration.

Establishing Private Rates overrides settings found on the Agency Configuration and are mainly used to establish a rate code different from Agency Configuration pricing set in the GDS with that code. If several airlines use the same rate code, enter the code on the Agency Configuration.

Note: When a site is cloned from a template, Private Rates are cloned too. Most Private Rates 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 is displayed. Click the **Private Rates** link.
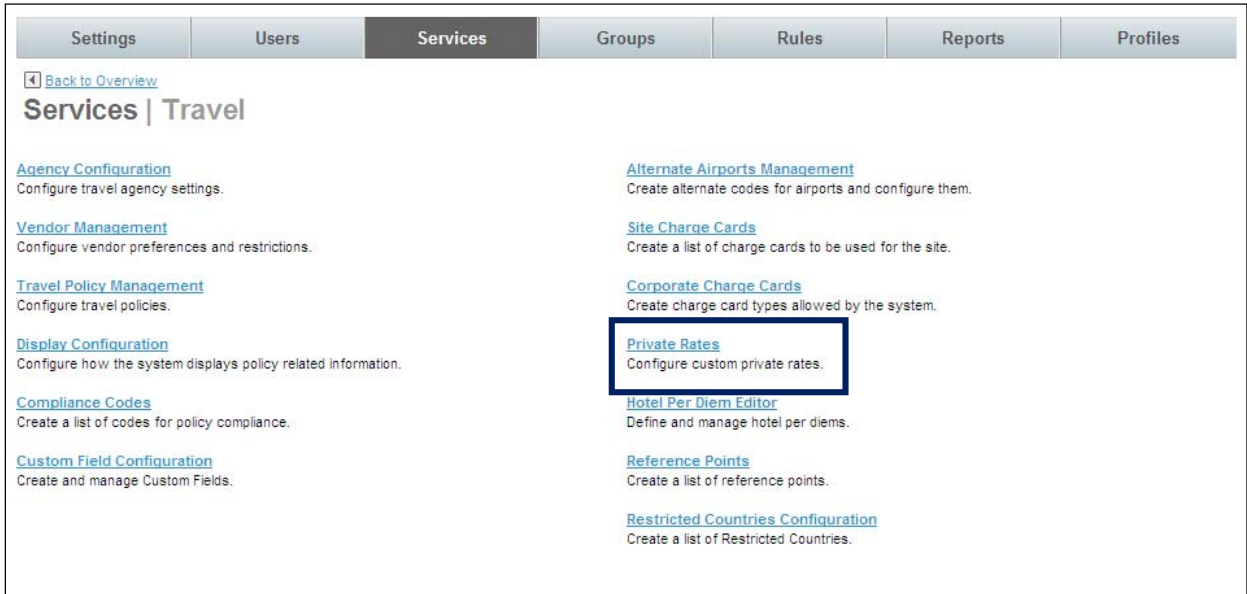
3. The **Services | Private Rates** page is displayed. Click the **Airlines Rates Private Rates** link.
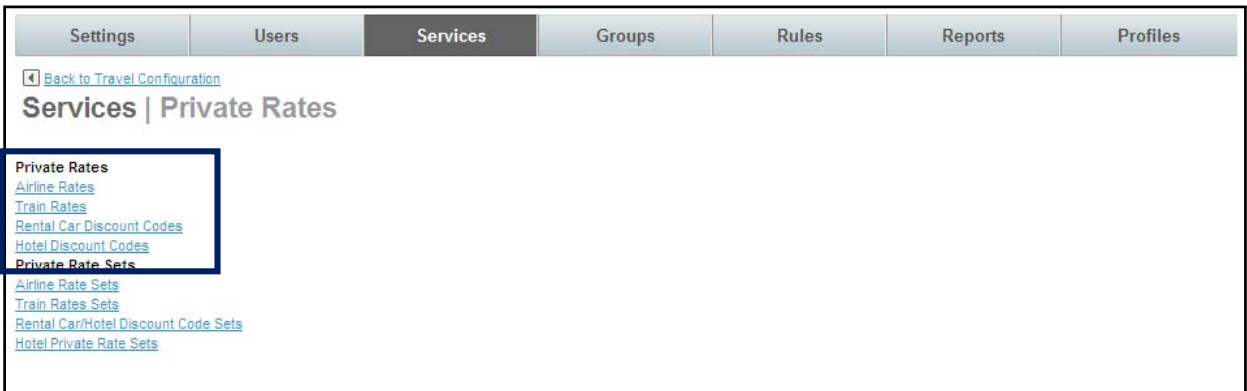
2.4.1 Private Rate List Items

Note: The *Private Rates* adhere to the List and Set structure.

2.4.1.1 Airline Private Rates

1. The **Services | Airline Rates** page is displayed. Click the **Add Private Rates** link to add a new private rate, or click an existing private rate record to edit that record.

- **Airline Private Rates:** Airline Private Rate records are generally configured to include only the following information. This allows the GDS to perform the pricing routine.
    - o **General Settings:**
        - Selected *Activate this private rate* check box
        - Private Rate Name
        - Selected *Apply this private rate on discounted itineraries* check box
        - Airline Name(s)
        - Selected *Use this rate code instead of the rate code in agency configuration* checkbox
        - GDS negotiated rate code
        - *Passenger Type* may also be required

- **Activate the private rate:** Select the checkbox to activate the private rate.
- **Private Rate Name:** Name the airline private rate to help recognize the market to which it applies.
    - o **Airline Private Rate Parameters:**

- **Select an airline to apply this private rate:** Select the airlines from the drop down list. Only one airline may be selected.

- o **Private Rate Booking and Ticketing Parameters:**
    - **Enter GDS negotiated rate code:**
        - Select the **Use this rate code instead of the rate code in agency configuration** checkbox to select this rate.
        - **Rate Code:** Enter the rate code provided by GDS for this private rate.
    - **Enter the GDS passenger type:**
        - **Passenger Type:** This code may also be needed for the pricing to be returned correctly by GDS.
2. Click the **Save** to save the new **Airline Private Rate**.

2.4.1.2   Train Private Rates

- **Train Private Rates:** Train Private Rate records are generally configured to include special rates established for train travel.
    - o **General Settings:**

- **Activate the private rate:** Select the checkbox to activate the private rate.
- **Private Rate Name:** Name the airline private rate to help recognize the market to which it applies.
- **Start Date:** Select the *Month, Day* and *Year* from the drop down list or click the calendar and make the selection on the calendar if the private rate will not take effect upon the save of the record.
- **End Date:** Select the *Month, Day* and *Year* from the drop down list or click the calendar and make the selection on the calendar if the private rate has an anticipated end date.

- o **Train Discount Codes:**
  - **Select a train carrier:** Select the train carrier from the drop down list. Carriers available are Amtrak, Deutsche Bahn, Eurostar, Thalys, and VIA Rail Canada.
  - **Discount Code:** Enter the train discount code.
  - Enter Message to display to users describing discount to be applied at time of purchase. This will be displayed on review pages. Enter a message to display on purchase review page.

- Click the **Save** to save the new Train Private Rate.

2.4.1.3 Car Rental Discount Codes

- ▪ **Car Rental Discount Codes:**

Note: For Car Rental companies to appear within the trip search results Car Rental Discount Code records must be entered regardless of if there is a real discount in place. Name the code "Dummy Car Rental Discount".

o **General Settings:**

- **Discount Code Name:** Name the discount code to help recognize the market to which it applies.
- **Activate the private rate:** Select the checkbox to activate the private rate.

o **Rental Car Discount Code:**
- **Select a car rental company:** Select the car rental company from the drop down list.
- **Request rates that are lower, if available:** Select the *Yes* or *No* radio button to request lower rates if available.
- **Allow cars with guarantee:** Select the *Yes* or *No* radio button to allow cars that require guarantees.
- **Allow Non-Compliant Rates to be offered?:** Select the *Yes* or *No* radio button to allow cars that are non-compliant to company policy to be displayed.
- **Only offer this vendor when others are sold out:** Select the *Yes* or *No* radio button to only offer this vendor when others are sold out. This is only available for airport searches.
- **Override user's id with direct bill number?:** Select the *Yes* or *No* radio button to override the user's id with the direct bill number.

- **Enter unique GDS format required for direct bill (optional):** Enter the information as it is provided by the car rental company.
  - o **Location Preferences:**
    - **Apply globally (except where overridden by locale)** Enter the following fields if appropriate:
      - **Corporate Discount Number:** Enter the corporate discount number received from the car rental vendor
      - **Override rate code:** Enter the override rate code received from the rental car vendor
      - **Direct bill number:** Enter the direct bill number received from the rental car vendor
    - **Add a locale:** Select this link to select specific locations for use of this discount code.
      - Apply By Locale:

        If *by airport codes* was selected, enter the airport codes allowed to use this discount code separated by semi-colons. An example: *SFO;IDE;FLL.*

        If *by states* was selected, select the state(s) from the drop down list. Select more than one by holding down the control key while making selections.

        If *by countries* was selected, select the state(s) from the drop down list. Select more than one by holding down the control key while making selections.

1. Click the **Save** button to save the new private rate / discount code. The **Services | Code** page is redisplayed. Click the **Back to Private Rates** link to return to the **Services | Private Rates** page.

2. Click the **Private Rate Sets** link to add the **Private Rate / Discount Code** list to a set. Select the appropriate Private Rate type's link.

2.4.1.4   Hotel Discount Codes

- **Hotel Discount Codes:**
  - o **General Settings:**

- - **Activate the private rate:** Select the checkbox to activate the private rate.
    - **Discount Code Name:** Name the discount code to help recognize the market to which it applies.
  - o **Hotel Discount Codes:**

Note: Due to GDS restrictions, generally only one hotel list will be entered. Worldspan, Sabre and Apollo limit the number of hotel discount codes to 3. Entering more than the allowed number of discount code lists or an invalid discount code may result in issues with hotel availability search results. If availability is in question, this area may be configured incorrectly.

- - **Enter one or more comma separated GDS corporate rate ID's to request discounted room rate:** Enter the GDS provided corporate ID's that can request the discounted rates. NOTE: This field requires commas between entries.
    - **Limit the display of hotel room rates to those whose rate descriptions match any of the following comma separated key words or phrases:** Display only

hotels whose rate descriptions include the key words entered. Examples: *Government* or *Gov, AAA, Travel Agency*

Note: Add any additional hotel rate descriptions that may return from the GDS if appropriate.

- **Remove hotel room rates from the display if the rate description matches any of the following comma separated key words or phrases:** Do not display only hotels whose rate descriptions include the key words entered. Examples: *Government* or *Gov, AAA, Travel Agency*

Note: Add any additional hotel rate descriptions that may return from the GDS if appropriate.

- **Enter up to 15 character label that will be shown next to preferred rates:** Enter a tip or hint to indicate to the traveler this is a preferred property.
- **Limit rate match to:** Drop down list includes *Preferred Hotels and Chains, Preferred Hotels – Defined Rate and Chains, Preferred Hotels – Defined Rate, Preferred Hotels Any Rate* or *Preferred Chains Only.*
- **Allow non-preferred rates to display if the rate is less than the lowest preferred rate:** Select *Yes* or *No.*
- **Perform rate and keyword match at:** Select *Both site and Partner, Site* or *Partner.*
- **Show non-preferred rates:** Select *In line with preferred rates, Only if preferred rates unavailable,* or *Never show non-preferred rates.*
- **Remove Preferred flag when preferred rate is unavailable:** Select *Yes* or *No.*
- **Request specific hotel rate type, if available:** Select *Yes* or *No.*
- **Enter only one valid rate type:** Enter the rate type. Examples: *GOV, G.*

Note: This code may differ by GDS. If no rates are returned, the code may be incorrect for that GDS.

- **Select a hotel chain and enter your corporate discount number for the chain to book discounted room rates:**
    - Click **Add another discount code**: to select and add hotel chain names for the drop down list.
    - Enter the **Discount Number** provided by the hotel chain to allow the discount's use.

1. Click the **Save** to save the private rate / discount code. The **Services | Code** page is redisplayed. Click the **Back to Private Rates** link to return to the **Services | Private Rates** page.

2. Click the **Private Rate Sets** link to add the **Private Rate / Discount Code** list to a set. Select the appropriate Private Rate type's link.

2.4.2 Private Rate Sets

Airline and Train Private Rate Sets are processed using the same steps.

2.4.2.1 Airline and Train Private Rate Sets

- **Airline (Train) Private Rate Sets:**

- o Click the **Add A New Airline (Train) Rate** link to add a new set, or click an existing set record to edit that record. The **Services | Add** page is displayed.
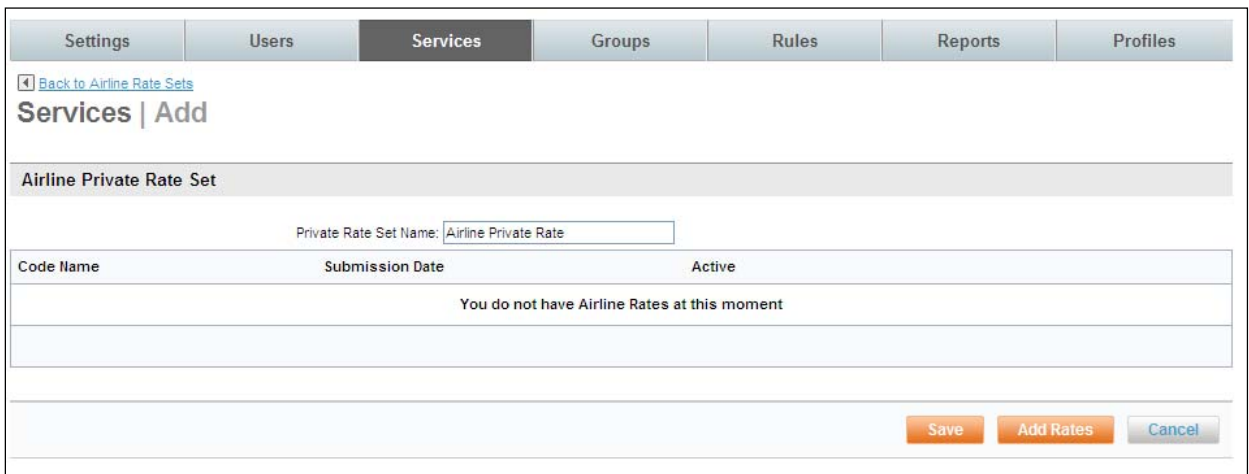
- - **Private Rate Set Name:** Name the Private Rate Set. This name should be easily recognizable as a specific Private Rate Set configuration. An example is *Airline Private Rates* or *Train Private Rates*.
- o Click the **Add Rates** button. Select the radio button beside the Airline (Train) Rates List name to add it to the set.
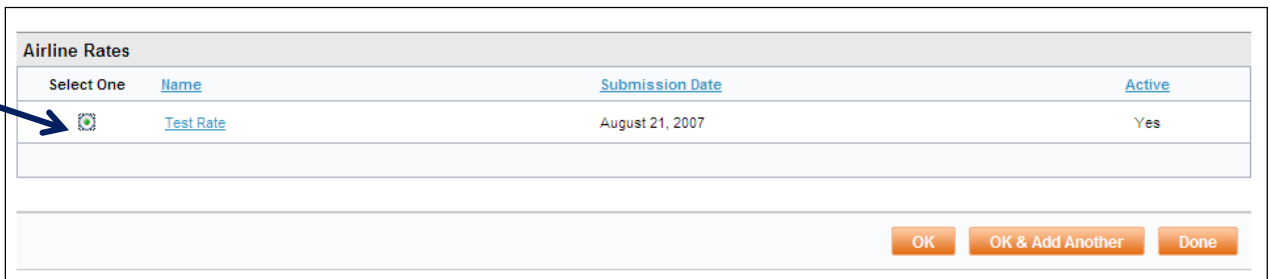
- o Click **OK** if there is only one list to add, or click the **OK & Add Another** if others need to be added to the set.
- o Click **Done** to save the list in the set.
- o Click the **Save** to save the new Private Rates Set and **Back to Private Rates** to return to the **Services | Private Rates** page.

2.4.2.2   Rental Car / Hotel Discount Code Sets

- ▪ **Rental Car / Hotel Discount Code Sets:**

Note: Rental cars must be added to the set for them to appear in trip search results.

Note: Add rental car and hotel discount lists to the same set.

Note: Add only 3 or 4 hotel discount code lists to one set depending on the GDS.

- o   Click the **Add A New Rental Car Discount Set** link to add a new set, or click an existing set record to edit that record. The **Service | Add** page is displayed.
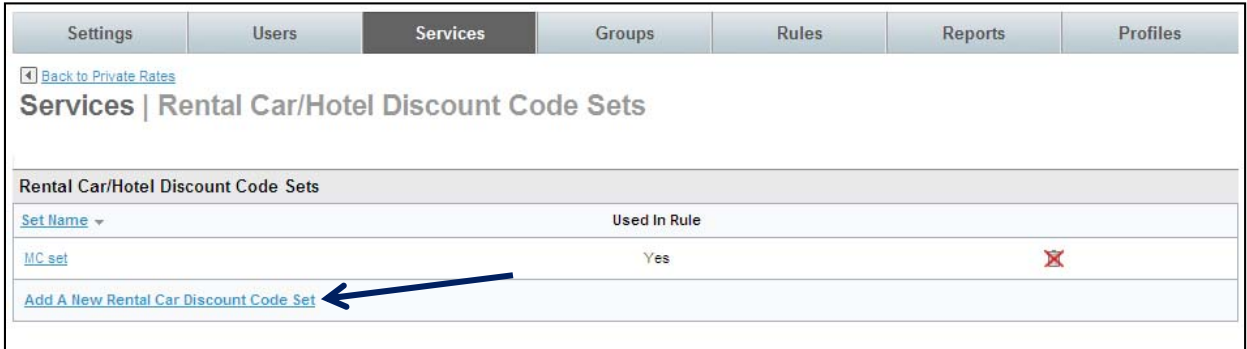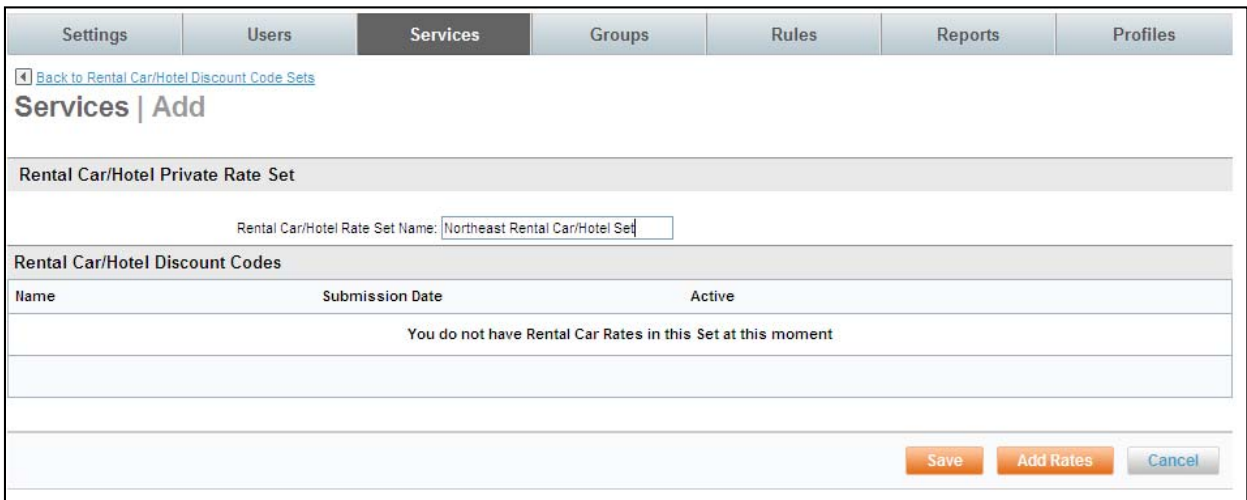

- -   **Rental Car / Hotel Rate Set Name:** Name the Private Rate Set. This name should be easily recognizable as a specific Private Rate Set configuration. An example is *Northeast Rental Car/Hotel Set* or *Hotel Rate Codes*.

    o   Click the **Add Rates** button. Select the radio button beside the Car Rental or Hotel List name to add it to the set.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Add

Services | Search & Add Discount Code

Search for Rental Car/Hotel Rate Starting with: [_____] [Search]

Rental Car/Hotel Discount Codes

Select One	Name	Submission Date	Active
○	ET	August 21, 2007	Yes
◉	ZI	August 21, 2007	Yes
			First | **11 - 12 of 12**

[OK] [OK & Add Another] [Done]

    o   Click **OK** if there is only one list to add, or click the **OK & Add Another** if others need to be added to the set.

    o   Click **Done** to save the list in the set.

    o   Click the **Save** to save the new Private Rates Set and **Done** to return to the **Services | Private Rates** page.

2.4.2.3   Hotel Private Rate Sets

▪ **Hotel Private Rate Sets:**

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Private Rates

Services | Hotel Private Rate Sets

Hotel Private Rate Sets

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

Add A New Hotel Private Rate Set

Note: The Hotel Private Rate Set provides a method to upload files using the template supplied. The upload fully replaces an existing file, it does not append to it. Therefore, all records must be loaded each time a change is needed. We also recommend keep a historical file to allow restoring a successful file while research is conducted into a failed upload.

Note: If Hotel Search Results are being displayed using the tabbing function, the hotels loaded using the Hotel Private Rate Set upload will be presented to the user within the category of "Corporate Preferred Hotels"
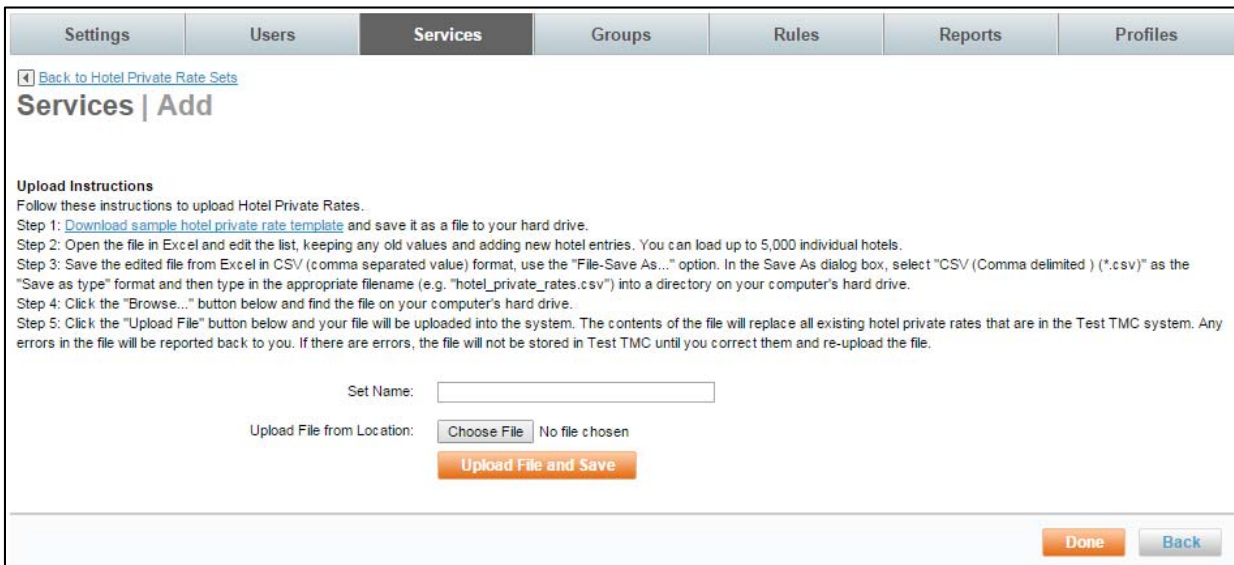
- o Click the **Add A New Hotel Private Rate Set** link to add a new set, or click an existing set record to edit that record.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Private Rates

Services | Hotel Private Rate Sets

Hotel Private Rate Sets	
Set Name	Used In Rule
You do not have Sets for Negotiated Rates at this moment	
Add A New Hotel Private Rate Set	

- o The **Services | Add** page is displayed providing **Upload Instructions**.

Best Practice: It is recommended a new record be created for each upload instead of updating a preciously successful record. If the new upload fails for some reason, an older successful version of the upload can quickly be rerun instead of having either no records, or a partial file loaded in the Partner Dashboard because of the upload failure.

The upload function is a FULL file replace. Therefore, if new hotels are to be added to the database, those hotels need to be added to the existing spreadsheet and the entire file needs to be uploaded. Uploading only the new hotel will result in only that hotel being available to the traveler.

Settings	Users	Services	Groups	Rules	Reports	Profiles

◀ Back to Hotel Private Rate Sets

Services | Add

Upload Instructions
Follow these instructions to upload Hotel Private Rates.
Step 1: Download sample hotel private rate template and save it as a file to your hard drive.
Step 2: Open the file in Excel and edit the list, keeping any old values and adding new hotel entries. You can load up to 5,000 individual hotels.
Step 3: Save the edited file from Excel in CSV (comma separated value) format, use the "File-Save As..." option. In the Save As dialog box, select "CSV (Comma delimited) (*.csv)" as the "Save as type" format and then type in the appropriate filename (e.g. "hotel_private_rates.csv") into a directory on your computer's hard drive.
Step 4: Click the "Browse..." button below and find the file on your computer's hard drive.
Step 5: Click the "Upload File" button below and your file will be uploaded into the system. The contents of the file will replace all existing hotel private rates that are in the Test TMC system. Any errors in the file will be reported back to you. If there are errors, the file will not be stored in Test TMC until you correct them and re-upload the file.

Set Name: [   ]

Upload File from Location: [Choose File] No file chosen

[Upload File and Save]

[Done] [Back]

- - **Set Name:** Name the Hotel Private Rates Set. This name should be easily recognizable and include the run date.
  - **Upload File from Location / Choose File:** Click the **Choose File** button to select a file to upload into the Partner Dashboard. The file must conform to Partner Dashboard standards.
- o **Upload Instructions:** Follow these instructions to upload Hotel Private Rates.
  - Download sample hotel private rate template and save it as a file to the hard drive.
  - Open the file in Excel and edit the list, keeping any old values and adding new hotel entries. Up to **5,000 individual hotels** can be loaded.

- Save the edited file from Excel in CSV (comma separated value) format, use the "File-Save As..." option. In the Save As dialog box, select "CSV (Comma delimited) (*.csv)" as the "Save as type" format and then type in the appropriate filename (e.g. "hotel_private_rates.csv") into a directory on the computer's hard drive.
- Click the "Browse..." button below and find the file on the computer's hard drive.
- Click the "Upload File" button below and the file will be uploaded into the system. The contents of the file will replace all existing hotel private rates that are in the site system. Any errors in the file will be reported back to the user who submitted the job. If there are errors, the file will not be stored in the site until they are corrected and re-upload into the database.

1. When the file completes, click **Done** to save the upload.

Note: Previously uploaded files can be downloaded by clicking the Private Rate Set name on the list and then clicking the **Download** link. The previously uploaded file will download with all fields completed.

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2. Click **Done** to return to the **Services | Private Rates** page and the **Back to Travel** link to return to the **Travel** page.

3. Click the **"_ changes not applied"** link to view the changes. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.

2.5 Reference Points

Reference points are destinations that are frequently visited by the corporate travelers and must have specific addresses. They may be located within a single city or not. Generally reference points would be the specifics of several locations within a campus or city. An example would be a large corporation may be located in several buildings throughout an area. By defining each location in the Partner Dashboard, accurate distances can be returned when radius searches are performed for car services and hotels.

Reference points are loaded in the Partner Dashboard by the site administrator.

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

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

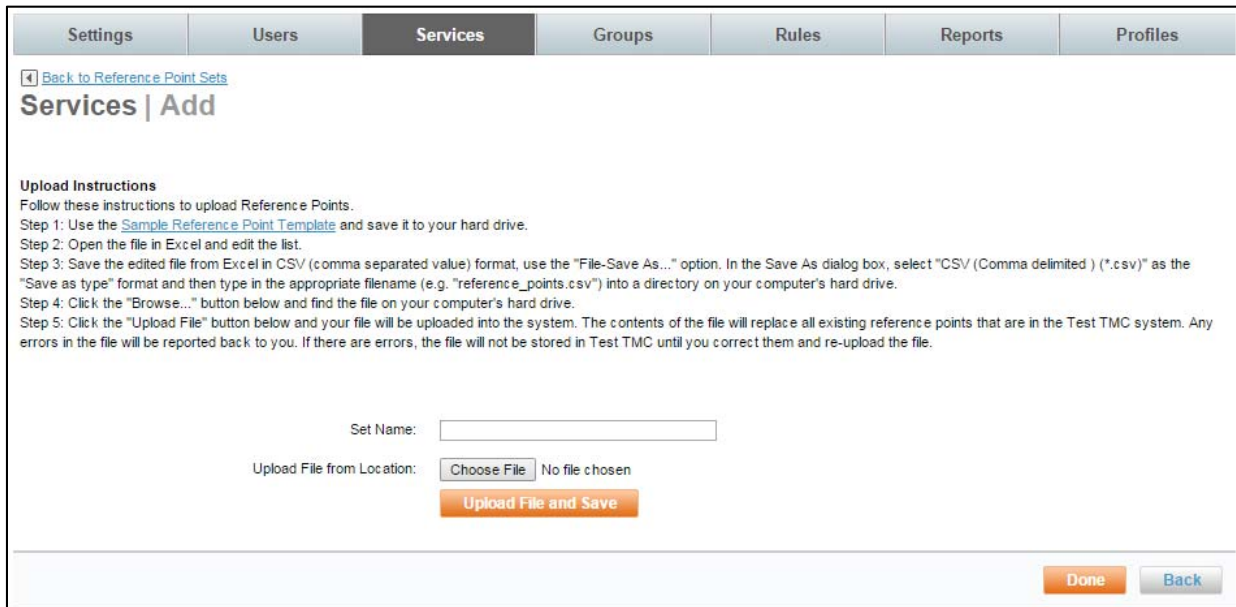2. The **Services | Travel** page is displayed. Click the **Reference Points** link.

3. The **Services | Reference Points** page is displayed. Click the **Add a New Reference Points Set** link to add a new reference point file, or click a reference points record to edit that record.

4. The **Services | Add** page is displayed providing **Upload Instructions**.

Best Practice: It is recommended a new record be created for each upload instead of updating the preciously successful record. If the new upload fails for some reason, an older successful version of the upload can quickly be rerun. When the upload fails, no reference points will be displayed to the traveler.

- ▪ **Set Name:** Name the Reference Point Set. This name should be easily recognizable and include the run date.
- ▪ **Upload File from Location / Choose File:** Click the Choose File button to select a file to upload into the Partner Dashboard. The file must conform to Partner Dashboard standards.
- ▪ **Upload Instructions** - Follow these instructions to upload Reference Points.
  - o Use the Sample Reference Point Template and save it to the hard drive.
  - o Open the file in Excel and edit the list.
  - o Save the edited file from Excel in CSV (comma separated value) format, use the "File-Save As..." option. In the Save As dialog box, select "CSV (Comma delimited) (*.csv)" as the "Save as type" format and then type in the appropriate filename (e.g. "reference_points.csv") into a directory on the computer's hard drive.
  - o Click the "Browse..." button below and find the file on the computer's hard drive.
  - o Click the "Upload File" button below and the file will be uploaded into the system. The contents of the file will replace all existing reference points that are in the site system. Any errors in the file will be reported back to the person who submitted the file. If there are errors, the file will not be stored in site until they are corrected and the file is re-uploaded.

Note: To remove data previously uploaded in a field, it is recommended double quotes ("") be entered into the field to completely remove data. This is especially true for fields with a text type.

5. When the file to upload has been located, click the **Upload File and Save** button to process the file.

6. When the file completes, click **Done** to save the upload.

Note: Previously uploaded files can be downloaded by clicking the Private Rate Set name on the list and then clicking the **Download** link. The previously uploaded file will download with all fields completed.

7. Click **Done** to return to the **Services | Reference Point** page and **Back to Travel** to return to the **Travel** page.

8. Click the **"_ changes not applied"** link to view the changes. The changes made since the last commit are displayed. Click the **Commit** button to commit the changes to the database.