

Oracle® Hospitality Suite8

Mailing Wizard User Manual

Release 8.10.1.0

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Preface

Audience

This user guide is intended for system administrators, support and users familiar with the Suite8 modules

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

[https:// support.oracle.com](https://support.oracle.com)

When contacting Customer Support, please provide the following:

- Product version and program/ module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at

[http:// docs.oracle.com](http://docs.oracle.com)

Revision History

Date	Description of Change
October, 2016	<ul style="list-style-type: none">• Initial documentation

1 Mailing Wizard Installation & User Guide

Introduction

This document outlines the configuration and describes the functionality of the sql-based mailing wizard available from Version 8.10.1.0 onwards.

Feature Availability

The functionality is only available if the global setting **Mailing Wizard** is activated under **Suite8 Configuration->Global Settings->Profiles->Profile 1 Tab**.

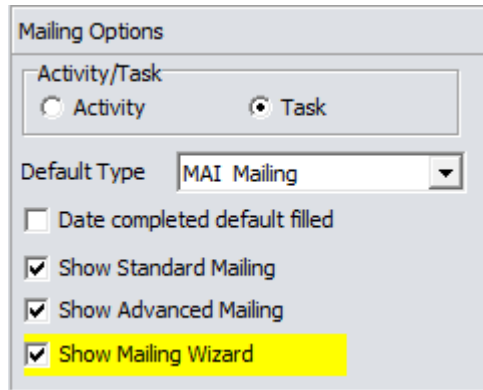
Prerequisites

- Suite8 Version 8.10.1.0 or higher

2 Configuration

Global Settings

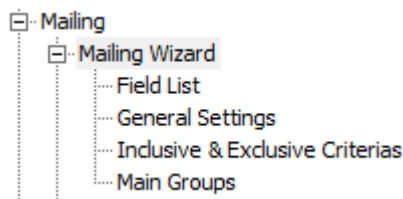
- Under Suite8 **Configuration->Global Settings->Profile1 tab** activate the flag **Show Mailing Wizard**.



The 'Mailing Options' dialog box is shown. It has a tabbed interface with 'Profile1' selected. Under the 'Activity/Task' section, the 'Task' radio button is selected. The 'Default Type' dropdown is set to 'MAI Mailing'. There are four checkboxes: 'Date completed default filled' (unchecked), 'Show Standard Mailing' (checked), 'Show Advanced Mailing' (checked), and 'Show Mailing Wizard' (checked and highlighted in yellow).

Setup

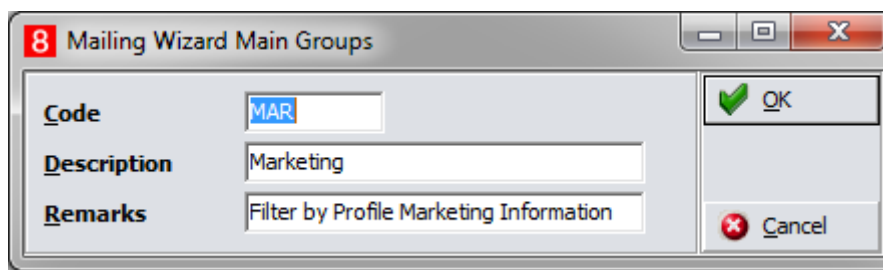
- The configuration for the mailing wizard is available under Suite8 **Configuration->Miscellaneous->Mailing Wizard**.



Note: A basic setup of the configuration will be provided when updating to or installing Suite8 version 8.10.1.0.

Main Groups

Code	Description	Remarks
MAR	Marketing	Filter by Profile Marketing Information
INP	Individual Profile	Individual Profile
RES	Reservation	Reservation related filter
POS	Posting	Posting queries



The 'Mailing Wizard Main Groups' dialog box is shown. It has a title bar with a red '8' icon. The dialog contains three input fields: 'Code' (with 'MAR' entered), 'Description' (with 'Marketing' entered), and 'Remarks' (with 'Filter by Profile Marketing Information' entered). On the right side, there are 'OK' and 'Cancel' buttons with green and red icons respectively.

1. Main Groups need to be defined for the different sections to create mailings for.

Inclusive & Exclusive Criteria

The inclusive and exclusive criteria section defines the criteria that can be selected for mailing queries.

Code	Description	Main Group
BIR	Birthday	Individual Profile
BIM	Birthday in Month	Individual Profile
BDR	Birthday in Date Range	Individual Profile
BRA	Birthday in Date Range with age selection	Individual Profile
XYZ	Birthday AND Actioncode	Individual Profile
SCC	Scope City	Marketing
RMP	Potential	Marketing
STR	Sales Territory	Marketing
VIP	VIP Codes	Marketing
SCM	Simple Commission	Marketing
MAI	Mailing Codes	Marketing
PSO	Primary Sales Office	Marketing
SOU	Source	Marketing
PRI	Priority	Marketing
NEW	Newspaper	Marketing
SPE	Specials	Marketing
IND	Industry Codes	Marketing
COM	Competition Code	Marketing
SCO	Scope	Marketing
PRO	Product Interest	Marketing
ACT	Action Codes	Marketing
INF	Influence	Marketing
PDM	Pref. Distribution	Marketing
PNA	Posting by Article	Posting
RS2	Reservation Departure in Selected Range	Reservation
RS1	Reservation No of Stay	Reservation

8 Mailing Wizard Details

Code

MAI

Description

Mailing Codes

Main Group

MAR Marketing

Remarks

Mailing Codes

SQL

```

select XPAL.XPAL_XCMS_ID xcms_id
from xpal,xpda
where
XPAL.XPAL_XPDA_ID=XPDA.XPDA_ID
and XPAL.XPAL_XPAC_ID=13 and
XPDA.XPDA_SHORTDESC in
(:CODE_MAI)

```

OK

Parameters

Cancel

1. **Code:** enter a 3digit code.
2. **Description:** define a name.
3. **Main Group:** select the according main group.
4. **Remarks:** an additional information can be entered.
5. **SQL:** enter the according sql statement here.

6. Click on **Parameters**.

8 Mailing Wizard Parameter

Role String with data selection

Linked Detail MAI Mailing Codes

Multiple ☒

Table Name XPDA

Table Field XPDA_SHORTDESC

Parametername CODE_MAI

SQL select xpda_id, xpda_shortdesc, xpda_longdesc from xpda where xpda_xpac_id=13

Field 1 XPDA_SHORTDESC

Field 2 XPDA_LONGDESC

Field 3

Description

Remarks

OK **Cancel**

1. **Role**: select the role according to the criteria to be created.
2. **Linked Detail**: select the criteria.
3. **Multiple**: defines if multiple selection of codes should be possible.
4. **Table Name**: enter the table to be used for the parameter.
5. **Table Field**: enter the field to be used.
6. **Parametername**: enter the parameter name to be used for the sql statement.
7. **SQL**: enter the according sql statement.
8. **Field 1**: enter the field name to be displayed in the selection of the mailing query.
9. **Field 2**: enter the field name to be displayed in the selection of the mailing query.
10. **Field 3**: enter the field name to be displayed in the selection of the mailing query.
11. **Description**: description of the criteria.
12. **Remarks**: enter additional information.

General Settings

The general settings contain sql statements to define general filter.

8 Mailing Wizard Global Exclusion

Code Don't forget to add the selector MAINMWGE. to your SQL, like MAINMWGE.XCMS_ACTIVE = 1

Description

Remark

SQL

Field List

The field lists define the fields to be displayed in the mailing result as well as for the creation of letters, lists and so on.

8 Mailing Wizard Field List

Code

Description

Remark

SQL

Table Name

Link Field

Type

1. **Code:** enter a 3-digits code.
2. **Description:** enter the description of the field list.
3. **Remark:** additional remarks can be entered.
4. **SQL:** enter the according sql statement.
5. **Table Name:** Hint option to show table name.
6. **Link Field:** Hint option to show linked field.
7. **Type:** select the type the field list belongs to.

3 Mailing Wizard

1. Go to Customer Relation and Mailing.
2. Select tab **Mailing Wizard**.

The screenshot shows the 'Mailing Wizard' tab selected in a software interface. It features a search bar at the top right and a table of existing mailings below. The table has columns for Description, Creation Date, Username, Remarks, and # of executed Mailings. The sidebar on the right contains buttons for 'New', 'Edit', 'Delete', 'Executed Mailings', and 'Mailing Log'.

Description	Creation Date	Username	Remarks	# of executed Mailings
Birthday Mailing	5/27/2016 12:52:41 PM	Demonstration Super		0
Christmas Mailing	9/27/2016 11:48:08 AM	Demonstration Super		1
Mailing Codes	5/6/2015 4:16:30 PM	Demonstration Super		1

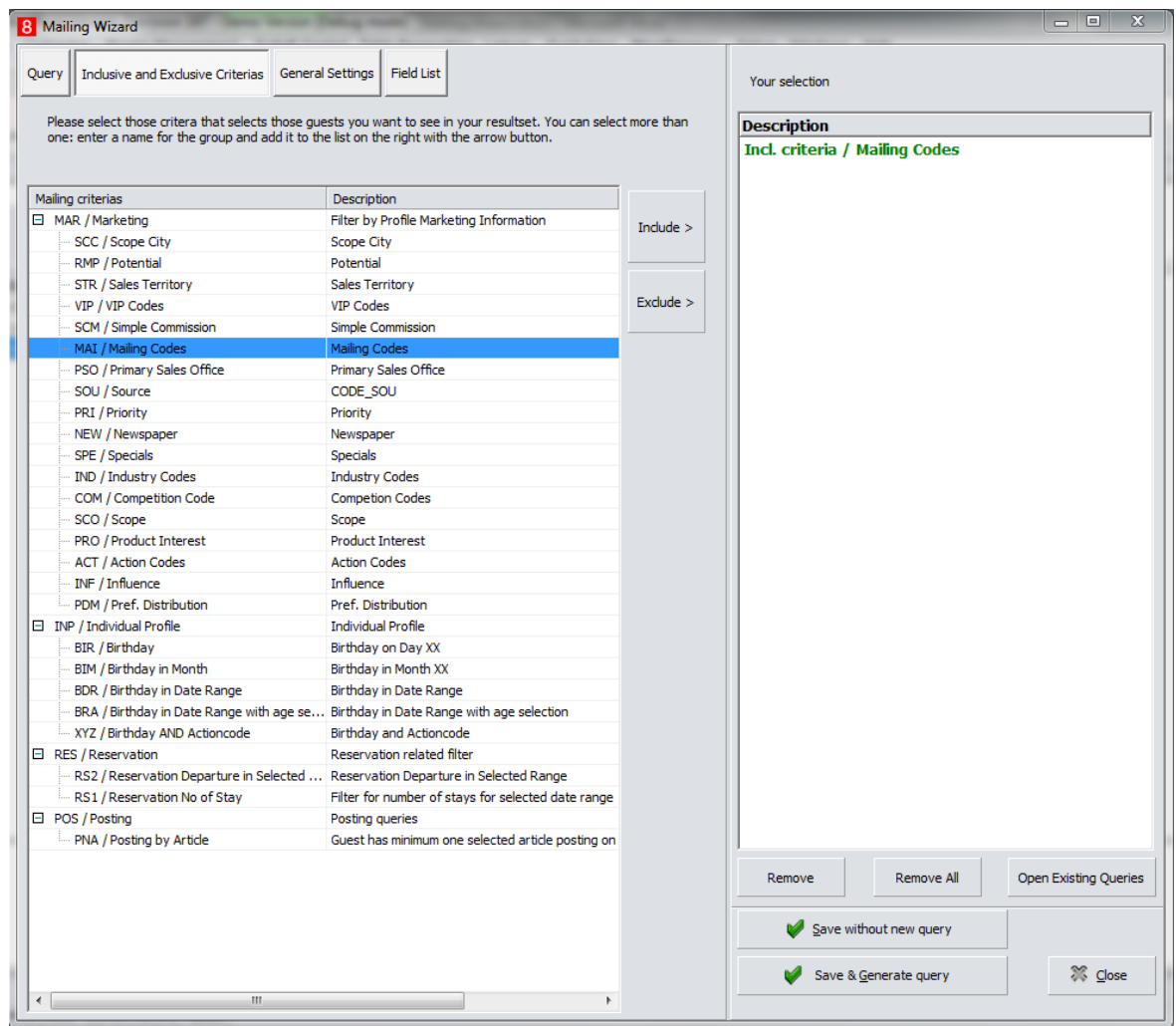
3. Select **New** to create a new mailing query or **Edit** to edit an existing one.

Query

The screenshot shows the 'Query' tab of the 'Mailing Wizard' window. It contains three input fields: 'Code' (with 'MAI' entered), 'Description' (with 'Mailing by Mailing Code' entered), and 'Remarks' (an empty text area). On the right, there is a 'Your selection' section with a 'Description' header and a large empty box. At the bottom right, there are buttons for 'Remove', 'Remove All', 'Open Existing Queries', 'Save without new query', 'Save & Generate query', and 'Close'.

1. **Code:** Enter a code.
2. **Description:** Enter the description of the mailing.
3. **Remarks:** enter additional remarks.
4. Click on **Inclusive & Exclusive Criteria**.

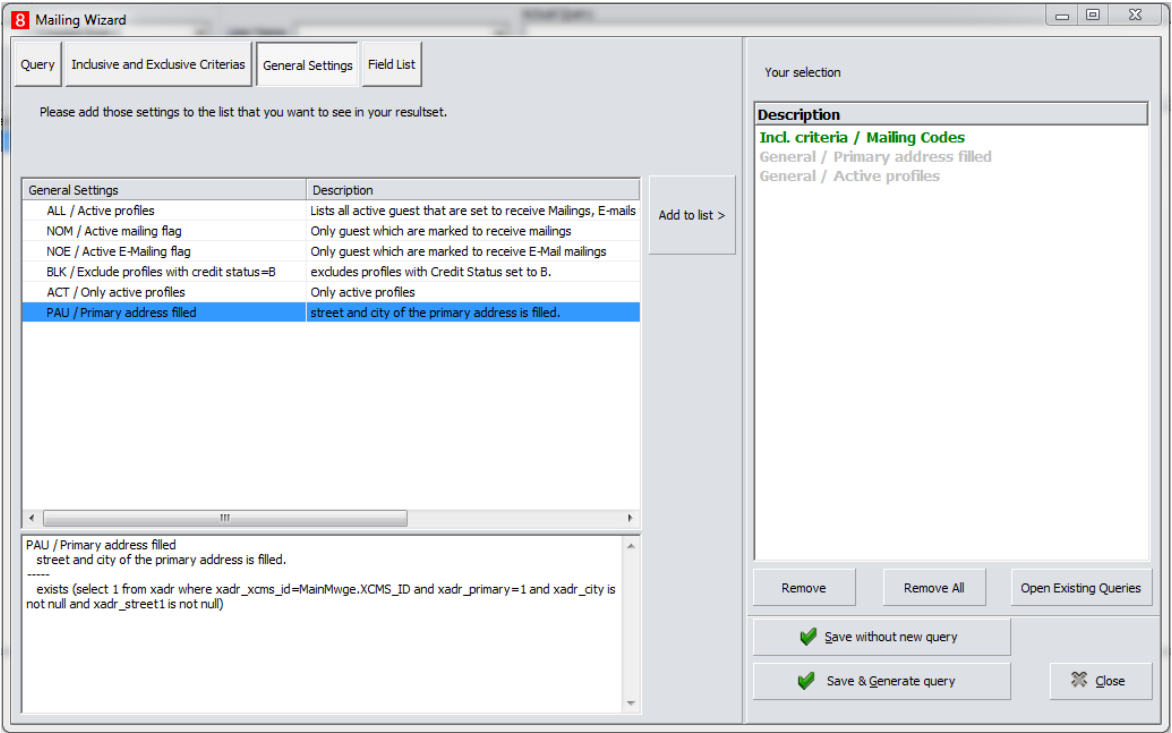
Inclusive & Exclusive Criterias



1. Select the according criteria and select **Include** to define if the criteria should be included or **Exclude** if it should be excluded.
2. **Remove**: removes a single selected criteria.
3. **Remove all**: removes all selected criteria.
4. **Open existing Query**: Shows the screen to run the mailing.
5. **Save without query**: saves the mailing query.
6. **Save & Generate query**: saves the mailing query and executes it.
7. Select **General Settings**.

Note: All listed single criteria are used as an **OR**-condition when executing the mailing. If you want to have an **AND**-condition the according sql statement needs to be defined, see example **Birthday AND Actioncode**. Included criteria will be displayed in green – excluded ones in red in the selection list.

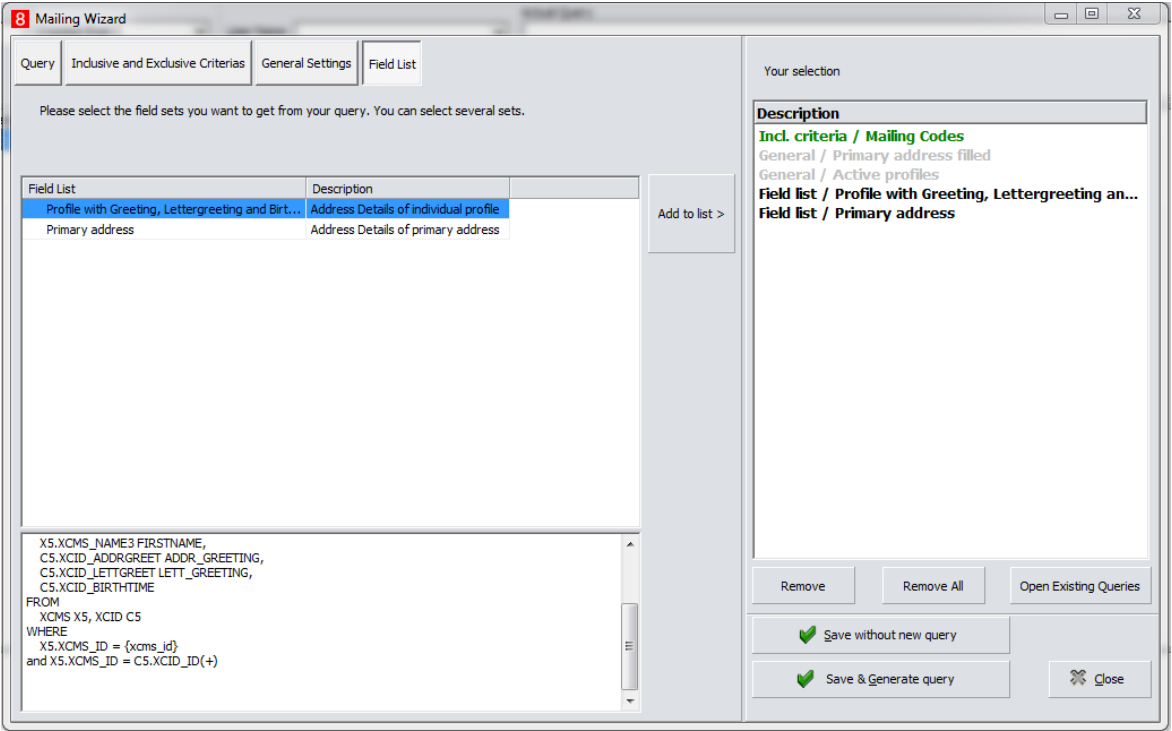
General Setting



1. Add the valid settings for the profiles to the list.
2. Select **Field List**.

Note: General settings are getting displayed in grey in the selection list.

Field List

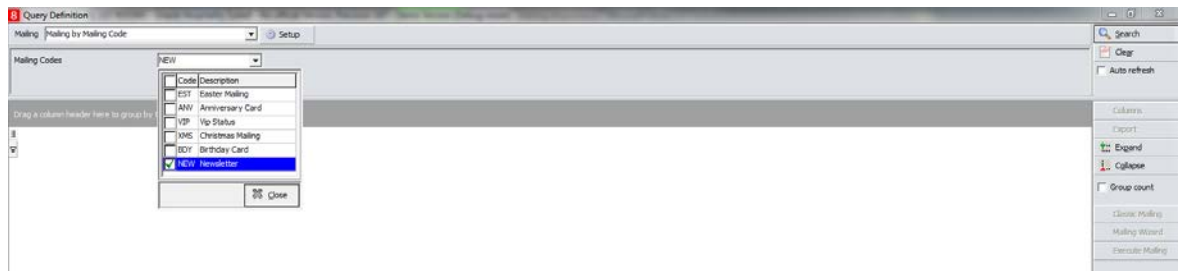


1. Add the according field list.

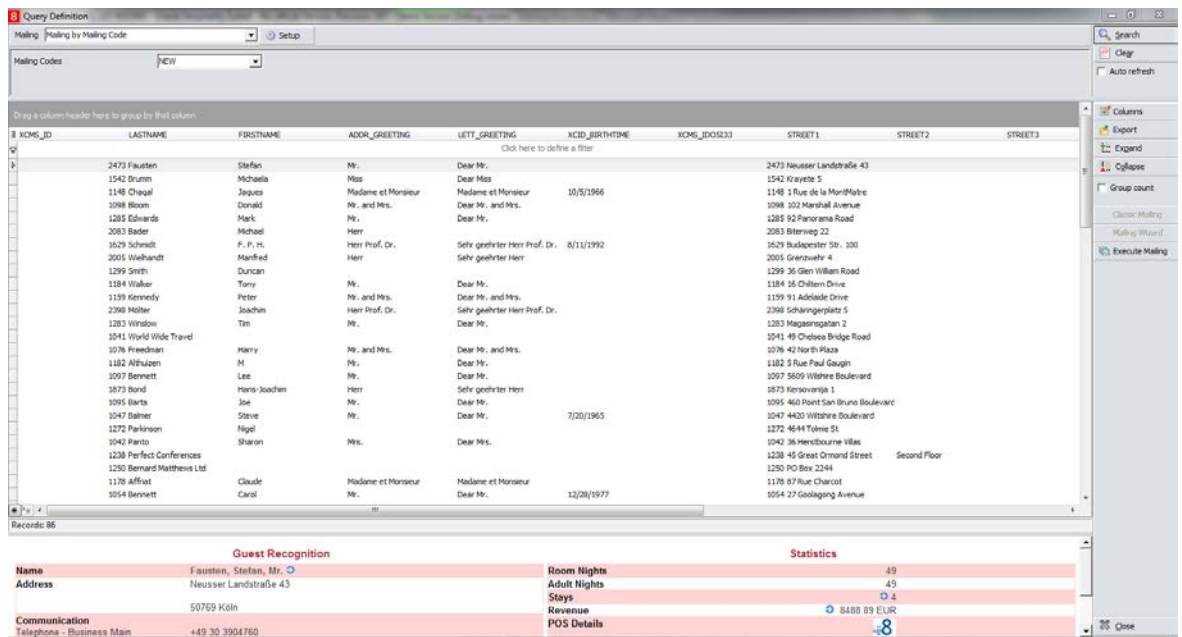
Note: Field lists are getting displayed in black in the selection list.

2. Click **Save and Generate query** or **Save without new query** when you want to run the mailing later.

Query Definition



1. **Mailing:** By default, the entered mailing query will be selected but drop down box shows all existing mailings and another one can be selected.
2. Select the according entries from defined Inclusive & Exclusive criteria.
3. Click **Search** to run the mailing query.



4. **Auto refresh:** If you select this option, new profiles which match the query will be included in the query.
5. **Columns:** setting of columns can be saved.
6. **Expand/Collapse:** will be used when a column has been grouped.
7. **Group count:** will be used when a column has been grouped.
8. Select **Execute Mailing** and the general Mailing result screen comes up.

Mailing Result

The screenshot shows a window titled '8 Mailing result'. It contains a table of mailing results with columns: XCMS_ID, LASTNAME, FIRSTNAME, ADDR_GREETING, LETT_GREETING, XCID_BIRTHTIME, and XCMS_IDC. The table lists various guests, with 'Fausten, Stefan, Mr.' selected. To the right of the table is a sidebar with buttons: Mark/Unm. all, Mark/Unm. sel, Execute, Word, Excel, Edit Profile, Expand, Collapse, Profile Info, Tasks, and Options. Below the table, there is a detailed profile view for 'Fausten, Stefan, Mr.' showing contact information, room nights, and statistics.

XCMS_ID	LASTNAME	FIRSTNAME	ADDR_GREETING	LETT_GREETING	XCID_BIRTHTIME	XCMS_IDC	
<input type="checkbox"/>	1631	Unbekannt	X.	Professor	Dear Professor	1/4/1915	1631
<input type="checkbox"/>	1094	Andrews	William	Mr.	Dear Mr.	5/6/1976	1094
<input type="checkbox"/>	1101	Dear	Walter	Mr.	Dear Mr.		1101
<input type="checkbox"/>	1175	Banz	Ursula	Frau	Sehr geehrte Frau		1175
<input type="checkbox"/>	1184	Walker	Tony	Mr.	Dear Mr.		1184
<input type="checkbox"/>	2549	Hundt	Toni	Mr.	Dear Mr.		2549
<input type="checkbox"/>	1283	Winslow	Tim	Mr.	Dear Mr.		1283
<input type="checkbox"/>	1086	Hurst	Stewart	Mr. and Mrs.	Dear Mr. and Mrs.		1086
<input type="checkbox"/>	1022	Davis	Steve	Mr.	Dear Mr.	7/2/1974	1022
<input type="checkbox"/>	1047	Balmer	Steve	Mr.	Dear Mr.	7/20/1965	1047
<input checked="" type="checkbox"/>	2473	Fausten	Stefan	Mr.	Dear Mr.		2473
<input type="checkbox"/>	30089	Lee	Stefan	Frau	Sehr geehrte Frau		30089
<input type="checkbox"/>	2159	Opdenhoff	Silke	Frau		11/20/1973	2159
<input type="checkbox"/>	1066	Cluft	Sidney	Mr. and Mrs.	Dear Mr. and Mrs.		1066
<input type="checkbox"/>	1042	Panto	Sharon	Mrs.	Dear Mrs.		1042
<input type="checkbox"/>	1071	Fields	Sarah	Mr. and Mrs.	Dear Mr. and Mrs.		1071
<input type="checkbox"/>	2606	Ericon	Sandra	Miss	Dear Miss		2606

Guest Recognition

Name Fausten, Stefan, Mr. **Address** Neusser Landstraße 43
50769 Köln

Communication
Telephone - +49 30 3904760
Business Main
Email - s.fausten@web.die
Business
Direct
Linked No Name Company

Statistics

Room Nights 49
Adult Nights 49
Stays 4
Revenue 8488.89 EUR
POS Details 8
Indicators

9. **Mark/unmark all:** all records will be marked.
10. **Mark/Unmark sel.:** selected records will be marked.
11. **Execute:** not used yet.
12. **Word:** select this option to create a mailing in Word. Select **New** on the select document screen as the listed field lists are only valid for standard and advanced mailing.
13. **Excel:** select this option to export the records to Excel.
14. **Edit Profile:** edits the selected profile.
15. **Expand and Collapse:** not used.
16. **Profile Info:** select this option to show the profile HTML and profile tree info.
17. **Tasks:** you can create tasks for the mailing, e.g. for the mailing itself and which can be defined as completed and also one for an update.
18. **Options:** not used.

Note: All mailing results of executed sql mailings will be saved and can be loaded **on Profiles->Options2->Load list of profiles from mailing wizard** by selecting the according mailing.