Siebel Hospitality Guide

Version 8.0, Rev. A

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Contents

Chapter 1: What's New in This Release

Chapter 2: Overview of Siebel Hospitality

About Siebel Hospitality 22

Business Purposes of Screens in Siebel Hospitality 22

Viewing Information on the Hospitality Home Page (End User) 25

Chapter 3: Getting Started with Siebel Hospitality

Administrator Setup Tasks 27

Hospitality Workflow Processes 29

Verifying Hospitality Workflows Are Active 31

Chapter 4: Setting Up Properties

About Hospitality Properties 33

Process of Setting Up Properties 34

Defining Airports and Booking Centers 34

Creating Addresses for Properties 35

Setting Up Guest Conveniences 35

Adding Property Records 36

Setting Up Nonparticipating Properties 39

Defining Property Facilities and Room Service Attributes 40

Defining Property Day Parts 40

Updating the Property Team 41

Defining the Property's Neighborhood Characteristics 42

Defining the Property Profile 43

Defining Property Policies 44

Adding Property Floor Plans 46

Creating Sell Notes for a Property 48

Setting Up Special Dates for a Property 49

Viewing the Property Calendar 50

Setting Up Property Clusters 50

Creating the Property Cluster 51

Assigning Clusters to a User 52

Using Cluster Visibility 52

Chapter 5: Setting Up Function Spaces, Sleeping Rooms, and Suites

Function Spaces, Sleeping Rooms, and Suites Administration 55

Process of Setting Up Function Spaces, Sleeping Rooms, and Suites 56

Creating Indivisible Specific Space 57

Creating Configured Specific Space 58

Creating Function Space Categories for a Property 59

Marking a Specific Space as Requiring Backup 60

Associating a Specific Space with Function Space Categories 61

Configuring the Do Not Move Flag 62

Defining Setup Style LOVs 63

Creating Property-Specific Setup Styles and Associating Packages 63

Associating Setup Styles with Function Space Categories 64

Optimizing Setup Styles for Specific Spaces 65

Creating Sleeping Rooms 65

User Scenarios for Mapping Sleeping Rooms 67

Process of Setting Up Suites 68

Setting Up Indivisible and Configured Specific Space Suites 69

Setting Up the Suite Category and Assigning Suite-Specific Spaces 70

Associating Setup Styles with Suites 70

Setting Up Suite Administration 70

Chapter 6: Setting Up Products and Assets

Product Administration in Hospitality 74

Process of Setting Up Products and Assets 74

Creating Hospitality Revenue Categories and Revenue Subcategories 75

Simple and Complex Products in Hospitality 77

Creating Simple Products for Hospitality Events 78

Creating Complex Products for Hospitality Events 79
Preparing a Simple Product Base for a Complex Product 79
Creating a Complex Product for Hospitality Events 80
Adding Catalog Visibility to Products 82
Creating the Product Catalog 82
Creating a Product Category 83
Adding Products to Catalogs and Categories 83
Adding Access Groups to Catalogs and Categories 84
Forecasting Product Consumption 85
Creating Generic Catering Products 86
Creating Generic Room Blocks 87
Creating Property-Specific Products 87
Mapping a Generic Catering Product to a Property-Specific Product 88
Mapping Generic Room Blocks to Property-Specific Room Types 89
Creating Hospitality Assets 89
Managing Function Spaces, Sleeping Rooms, and Categories as Products 91
Navigating to the Product Administration Screen from the Property Administration Screen 91
Adding Product Attributes to Function Spaces, Categories, and Sleeping Rooms 92
Creating Function Space Product Features for the Opportunity Screen's Function Agenda 93

Chapter 7: Setting Up Property-Specific Menus and Packages

About Menus and Packages Administration 95
Process of Setting Up Menus and Packages 99
Associating a Default Catalog Category With a Property 100
Creating Property-Specific Products 100
Adding Products to a Property 101
Associating Prices With a Property-Specific Product 103
Creating Assets for Property-Specific Products 103
Creating Property-Specific Menus 104
Adding Menus to a Property 104
Adding Items to a Property-Specific Menu 106
Associating Prices With a Property-Specific Menu 107
Creating Property-Specific Packages 107
Adding Packages to a Property 108

Adding Items to a Property-Specific Package 109
Associating Prices With a Property-Specific Package 111
Sharing Property-Specific Products With Other Properties 111
Ongoing Tasks for Setting Up Menus and Packages 111
Assigning Property-Specific Products to Catalog Categories 112
Creating Pricing Intervals for a Property-Specific Product 112
Viewing Property Price Lists 114
Revenue Allocations for Menus and Packages 114

Chapter 8: Setting Up Inventory Controls

Process of Setting Up Inventory Controls 120
Viewing Inventory Controls and Visibility 120
Defining Function Space and Suite Inventory Controls 121
Information Display Options in the Valid Authorization Levels List 122
Querying Function Space Inventory Controls 123
Editing Function Space Inventory Controls 124
Defining Sleeping Room Inventory Controls 124
Information Display Options in the Total Group Availability List 125
Editing Sleeping Room Inventory Controls 125
Querying Sleeping Room Inventory Controls 125

Chapter 9: Defining Day Parts, Status Indicators, and Setup Style Translations

Function Space Administration 128
Process of Defining Day Parts, Status Indicators, and Setup Style Translations 128
Setting Up Property Day Parts 128
Defining Function Space and Asset Inventory Status Indicators 129
Defining Turntime and Time Interval Information for Function Space Display 129
Defining Active and Backup Information 130
Defining Function Inventory and Asset Inventory Status Display Colors 130
Setting Up Function Space Setup Style Translations 132

Chapter 10: Setting Up Charge Codes, Taxes, and Service Charges

Hospitality Charge Codes, Taxes, and Service Charges 134
Process of Setting Up Charge Codes, Taxes, and Service Charges 134
Revenue Category Administration 135

Associating Revenue Categories with Products 135

Service Charge Administration 136
- Creating a Service Charge 136
- Associating a Service Charge with a Property 137

Tax Code Administration 138
- Creating a Tax Code 139
- Associating a Tax Code with a Property 139
- Associating Tax Codes with Service Charges 140

Charge Code Administration 140
- Defining Charge Codes 141
- Associating Charge Codes with Tax Codes 141
- Associating Charge Codes with Service Charges 142
- Reviewing Charge Codes Associated with a Revenue Category 142

Reviewing Property-Specific Taxes and Service Charges 143

Chapter 11: Setting Up Pricing and Property Pricing

Process of Setting Up Pricing and Property Pricing 145

Pricing and Property Pricing 146

Setting Up Price Lists 147

Property Pricing Administration 148

About the Property Pricing Profile 149
- Creating a Property Pricing Profile 149
- Defining Weekend Prices 150

Defining a Profit Series and Percentages 150

Defining Future Date Adjustments 151

Setting Up Special Dates 152

Function Space Pricing Administration 153
- Setting Up Pricing Day Parts 153
- Defining Function Space Pricing Rules 153
- Setting Up Average Values and Function Types 155
- Marking Function Spaces as Unavailable or Out Of Order 157

Using the Function Space Calendar 159

Sleeping Room Pricing Administration 159
- Setting Up Rates for Sleeping Rooms 160
- Defining Government Sleeping Room Pricing Rules 162

Using the Sleeping Room Calendar 164

Setting Up Pricing Controls for Function Spaces, Catering Products, and Sleeping Rooms 165

Discount Pricing Administration 165

Setting Up Full Day Discounts for Function Spaces 165

Setting Up Property Day Parts 166

Defining Full Day Discounts 166

Setting Up Volume Discounts 167

Creating Volume Discounts 167

Adding Volume Discount Line Items 168

Associating Volume Discounts with a Property 169

Creating Aggregate Volume Discounts for Sleeping Rooms and Suites 170

Setting Up a Matrix Series 170

Creating a Matrix Series 171

Defining an Account Matrix Discount 171

Defining a Segment Matrix Discount 173

Updating All Adjustment Amounts of a Series Record 174

Suite Pricing Administration 175

Chapter 12: Defining Event Templates

About Event Templates 177

Process of Creating Event Templates 177

Creating a Generic Event Template 178

Creating a Property Specific Event Template 179

Adding a Function Agenda and Line Items 180

Adding Room Block Information 181

Adding Room Blocks and Line Items 182

Chapter 13: Post Event and Resume Templates

About Post Event and Resume Templates 183

Creating Post Event and Resume Templates 183

Chapter 14: Managing Hospitality Accounts and Contacts

About Hospitality Accounts and Contacts 185

Scenario for Managing Accounts and Contacts 185

Process of Managing Hospitality Accounts and Contacts 186

Managing the Account Travel Profile 187

Creating a Travel Account Profile 188
Adding a Travel Control Assessment 191
Creating Account Event Templates 192
Viewing Account Transactions 193
Tracking Intermediary Accounts 193
Creating an Account Business Plan 193
Managing a Contact's Travel Profile 194
Creating Contact Event Templates 195

Chapter 15: Capturing Hospitality Opportunities

Scenario for Capturing Hospitality Opportunities 197
Process of Capturing Hospitality Opportunities 198
Creating Hospitality Event Opportunities 198
Adding a Function Agenda and Line Items to an Event Opportunity 203
Adding a Function Agenda to an Event Opportunity 203
Adding Function Agenda Line Items to an Event Opportunity 205
Using Function Agenda Buttons When Defining an Opportunity Function 206
Adding Room Block Information to an Event Opportunity 208
Using Rapid Room Block 209
Adding Room Block Information 209
Adding Room Blocks to an Opportunity 210
Adding Room Block Line Items to an Opportunity 212
Copying Room Block Line Items 212
Selecting Properties for the Event Opportunity 213
Using the Property Locator 213
Using the Property Screen 215
Adding a Property to an Opportunity 215
Applying an Event Template to an Opportunity 216
Adding Details to the Event Opportunity 217
Modifying the Opportunity Arrival Date 218
Adding Activities to an Event Opportunity 219
Adding Attachments to an Event Opportunity 219
Adding Notes to an Event Opportunity 220
Adding General Billing Information to an Event Opportunity 220
Adding Macro Estimates to an Opportunity 222
Adding an Assessment to the Event Opportunity 224

Using Quick Opportunity Capture 224

About Host-Affiliate Relationships 225

Creating the Host Opportunity 226

Associating Affiliate Accounts with the Host Opportunity 226

Creating the Affiliate Opportunity 227

Using the Opportunity Explorer 228

Using Opportunity Charts 229

Chapter 16: Managing Recurring Events

About Recurring Events 231

Process of Creating Recurring Events 232

Creating Recurring Events 232

Creating the Recurring Opportunity 232

Creating Subopportunities 233

Setting the Recurrence Details 234

Generating Quotes for Recurring Events 235

Generating Subopportunity Quotes 235

Compiling Aggregate Quotes 236

Compiling What-If Aggregate Quotes 237

Completing an Aggregate Quote Evaluation 237

Performing a Price Override for Room Blocks Associated with an Aggregate Quote 238

Changing the Projected Property 239

Submitting an Aggregate Quote for Evaluation 239

Chapter 17: Managing Property-Specific Event Quotes

About Property-Specific Quotes 242

Asynchronous Generation of Multiple Quotes 243

Scenario for Managing Property-Specific Event Quotes 245

Process of Managing Property-Specific Event Quotes 245

Generating an Event Quote 246

Generating Quotes from Opportunities 246

Generating Quotes from Recurring Events 247

Generating Quotes from Host-Affiliate Opportunities 247

Generating Host Quotes 247
Generating Affiliate Quotes 247
Modifying an Event Quote 248
Changing the Event and Sales Manager for a Quote 249
Overriding Multiple Event Quotes 250
Applying a Property-Specific Event Template to a Quote 251
Adding Details to an Event Quote 252
Modifying the Arrival Date in an Event Quote 253
Adding Quote Notes 254
Creating Quote Activities 254
Creating Attachments for a Quote 255
Capturing Billing Information for a Quote 255
Capturing Booking Fee Information 255
Capturing Credit Requests for an Event Quote 256
Managing Functions Associated with Quotes 257
Adding Functions and Function Line Items to a Quote 258
Adding Resource Cluster Line Items 259
Validating Functions and Function Line Items 259
Preventing Functions from Being Moved 260
Changing Selected Function Spaces with Product Features 261
Managing Quote Functions from the Function Screen 261
Managing Event Room Block Information in Quotes 261
Updating Room Block Information for a Quote 262
Updating Room Blocks and Line Items for a Quote 262
Updating Negotiation Rates for a Quote 263
Reviewing the Room Block Summary 264
Time Shifts for Function Spaces and Sleeping Room Blocks 265
Reviewing Quote Details 265
Reviewing Quote Summary Information 265
Reviewing the Quote Summary Revenue Thresholds List 267
Reviewing Quote Summary Negotiation Rates List 268
Reviewing Quote Summary Functions List and Function Line Items List 268
Reviewing Quote Summary Room Blocks List and Room Block Line Items List 269
Reviewing Quote Discounts 270
Applying Discount Percentages to Quotes, Functions, Room Blocks, and Line Items 270
Manually Applying a Negotiated or Discount Price to Line Items 271
Reviewing Function Discounts 272
Reviewing Room Block Discounts 273
Reviewing the Pricing Waterfall for Function Spaces and Sleeping Rooms 274

Reviewing the Total Discount for a Quote 276
Reviewing Revenue Estimates for Quote Functions 276
Reviewing Parent Revenue Category Revenue Estimates 276
Changing Revenue Category Estimates 282
Reviewing Macro Estimates for Quotes 283
Viewing the Quote Event Calendar 284
Using Quote, Function, and Room Block Charts 285

Chapter 18: Working with Inventory

Process of Working with Event Inventory 288
Management of Function Characteristics at the Opportunity Stage 288
Management of Room Block Characteristics at the Opportunity Stage 289
Management of Property Characteristics at the Opportunity Stage 290
Quote Generation Processes 290
Function Space Reservation 291
Management of Functions at the Quote Stage 291
Using Reserve and Next Fit to Hold Function Space 291
Optioning Function Space 292
Overbooking Function Space 293
Canceling a Function 293
Using the Function Space Inventory Buttons on Backup Spaces 294
Copying a Function 294
Understanding Function Status Values 296
Assigning a Function to a Specific Space 297
Detailing a Function 298
Suite Booking for Functions 300
Inconsistent Setup Styles and Function Space 300
Unit of Measure Conversions for Function Space Area 301
Flagging a Function for Spacious Set 301
Management of Functions That Require Backup Space 302
Identifying Function Spaces That Require Backup Spaces 302
Adding Backup Spaces to a Function 303
Understanding Booking Types for Function Spaces 305
Switching to the Backup Space 305
Management of Room Blocks at the Quote Stage 306
Reserving and Overbooking Room Blocks 307
Copying Room Blocks 309
Parceling Room Block Inventory from One Room Block to Another 309

Using the Room Block Inventory Buttons 310
Canceling Room Blocks 311
Booking Suite Categories 311
Booking Specific Suites 312
Canceling a Suite Category 313
Scheduling a Function in a Specific Suite 313

Background Processes at the Quote Level 314

Changing Attributes Critical to Inventory Reservation 314
Inventory Critical Fields at the Function Level 315
Inventory Critical Fields at the Room Block Level 316
Inventory Critical Fields at the Quote Level 317

Actualizing a Function 317
Out of Order and Unavailable 318

Time Shifting Event Functions and Room Blocks 318
Time Shifting Event Functions and Room Blocks 319
Reviewing Time Shift Information at the Quote Level 320
Event Shifting at the Quote Level 321

Checking Inventory Availability Using Property Screen Views 322
Reviewing Total Group Availability 322
Reviewing Sleeping Room Type Availability 323
Reviewing Total, Group, and Transient Availability 324
Reviewing Group Projected and Blocked Availability 326

Chapter 19: Booking Hospitality Assets

About Hospitality Assets 330
Automatic Reservation of Critical Assets 330
AutoBook and Noncritical Assets 331
Double-Booking and Rerenting Using the Availability Gantt Chart View 331
Cluster Booking of Assets 332

Scenario for Booking Hospitality Assets 333

Process of Booking Hospitality Assets 333

Defining the Asset Inventory Status Display Color Scheme 333

Booking Critical and Noncritical Assets 334

Launching Cluster Booking of Assets 335

Viewing Assets Associated with a Product 336

Viewing Asset Availability and Booking Information 336
Locating the Owner of the Booked Asset 337
Locating a Comparable Substitute for a Booked Asset 338

Chapter 20: Managing Property-Specific Menus and Packages

About Managing Menus and Packages 339

Process of Managing Menus and Packages 340

Accessing Quote and Order Functions 340
Adding Menu and Package Line Items to a Function 341
Adding Menu and Package Line Items to Event Checks 344
Editing Function Menus, Packages, and Line Items 344
Adding Products to a Menu or Package 347
Creating a Custom Menu or Package for a Function 349
Automatically Calculating System Allocations for Packages 350
Displaying Menu or Package Revenue Estimates 350
Substituting Products in a Menu or Package 351
Looking Up How Many Times a Menu Was Sold 351

Revenue Estimate Examples for Menus and Packages 352

Menu and Package Types Reference 356

Package Per Person Reference 356
Package Item Price Reference 360
Package Each Reference 363
Menu Per Person, Set Price Reference 365
Menu Per Person, Split Price Reference 368

Chapter 21: Managing Nonparticipating Properties

About Nonparticipating Properties 371

Process of Managing Nonparticipating Properties 372

Setting Up Nonparticipating Properties 372

Opportunities for Nonparticipating Properties Development Process 372

Generating Quotes for Nonparticipating Properties 373

Sending a Quote Summary to the NPP 374
Sending a Quote Evaluation to the NPP 375

Quotes Associated with Nonparticipating Properties Finalization Process 375

About Orders and Nonparticipating Properties 376

Chapter 22: Using the Function Space Diary

Process of Using the Function Space Diary 378

Function Space Diary Overview 378

Visibility Rules and the Function Space Diary 379

Function Space Diary Views 380
Function Space Diary View Elements 382
Viewing Function and Booking Details in the Function Space Diary 383
Icons in the Function Space Diary 387
Color Coding in the Function Space Diary 389
Using the Information Display Controls in the Function Space Diary 389
Storing User Preferences for the Function Space Diary 393

Using Drag and Drop Operations in the Function Space Diary 393

Viewing Floor Plans in the Function Space Diary 396

Changing Bookings in the Function Space Diary 397
Assigning Category Bookings 397
Deleting Out of Order and Unavailable Designations 398
Changing Booking Inventory Statuses 398

Querying the Function Space Diary 399
Querying for Bookings and Functions 400
Querying for Function Spaces 400
Querying for a Combination of Bookings and Function Spaces 401
Clearing Query Parameters from the Diary Views 401

Navigating to the Function Space Diary 402

Navigating from the Function Space Diary 403

Printing from the Function Space Diary 404

Chapter 23: Working with Quote and Order Pricing

About Quote and Order Pricing 406

Function Space Pricing 406
Function Space Room Rentals 406
Profit and Revenue Thresholds 407
Function Line Item and Revenue Data Repricing 409

Sleeping Room Pricing 411
Pricing and Room Occupancy 411
Complimentary Room Pricing 412
Weekday and Weekend Pricing 414
Calculating Weighted Average Room Rates 415
Pricing and the Negotiation Floor 415
Minimum and Maximum Price 416

Suite Pricing 416

Chapter 24: Revenue Management

Hospitality Revenue Management 418

Scenario for Revenue Management 418

Process of Revenue Management 419

Completing the Revenue Evaluation Form 419

Submitting a Quote for Revenue Evaluation 421

Evaluating the Event Quote 422

About Quote Evaluation Responses 423

- Specifying Evaluation Activities 423
- Creating an Evaluation Response 423
- Revenue Manager Approval of a Quote with a Negative Profit Variance 424

Viewing the Quote Evaluation Response 425

Updating and Reducing the Negotiation Floor Rate 425

Chapter 25: Finalizing a Quote, Turnover, and Confirming Event Details

Scenario for Finalizing a Quote, Turnover, and Confirming Event Details 428

Process of Finalizing a Quote and Managing Turnover 428

Generating an Agreement for the Quote 428

Setting an Event Quote Status to Definite 430

Completing and Submitting the Event Turnover Checklist 430

Reviewing and Accepting or Rejecting the Turnover 432

Gathering and Confirming Event Details 433

- Confirming Sleeping Room Details 433
- Confirming Function Space Details 434
- Gathering and Confirming Function Details 434
- Gathering and Confirming Additional Requirements for the Event 435
- Event Change Management 435

Chapter 26: Generating and Managing Event Orders

About Event Order Generation 437

Scenario for Generating and Managing Event Orders 438

Process of Generating and Managing Event Orders 439

Generating Primary Event Orders 439

Creating Function Orders 440
Changing the Primary Event Order Associated with a Function 441
Associating Event Orders with a Function Line Item 441
Creating Functions from the Orders Screen 442
Viewing All Line Items for an Order 443
Adding Notes to an Event Order 443
Adding Attachments to an Event Order 444
Viewing the Total Discount for an Order 444
Order Visibility 445
Viewing Orders Associated with a Quote 445
Viewing the Event Check Associated with an Order 446
Viewing the BEO Specifications for an Order 446
Viewing the Line Item Audit Trail for an Order 447

Chapter 27: Generating Event Checks

About Event Checks 449
Scenario for Generating Event Checks 450
Process of Generating Event Checks 450
Generating a Trial Check for an Event 450
Updating Event Orders 451
Generating an Event Check 452
Adding Line Items to an Event Check 453
Viewing Billable and Nonbillable Event Check Line Items 454
Posting Event Checks 455
Guest and Accounting Event Check Rules and Review 456
- Calculation Rules for Generating and Displaying Event Checks 457
- Reviewing Event Checks 462

Voiding an Event Check 463
Event Check Reports and Printouts 463

Chapter 28: Creating Hospitality Reports

Process of Administering Hospitality Reports 465
Configuring Reports 465

Configuring BEO and SOE Report Headers 466
Adding Report Logos to Properties 468
Configuring Banquet Revenue Summary Report Headers 468

About the Banquet Event Order (BEO) Report 469

Process of Generating Hospitality Reports 471
Reviewing and Adding Specifications for the BEO Report 471
Generating and Printing a BEO Report 472
BEO Report Fields 473

About the Schedule of Events (SOE) Report 476
Validating the Print Line in SOE Flag 477
Generating and Printing an SOE Report 478

About the Banquet Revenue Summary Report 479
Generating and Printing a Banquet Revenue Summary Report 480
Banquet Revenue Summary Report Fields 481

About the Quote Summary Report 482
Generating and Printing the Quote Summary Report 484

About the Guest Event Check Report 484
Generating and Printing the Guest Event Check Report 486

About the Accounting Event Check Report 487
Generating and Printing the Accounting Event Check Report 489

About the Function Space Products Report 489
Generating and Printing a Function Space Products Report 490
Function Space Product Report Fields 491

About the Function Space Setup Style Report 493
Generating and Printing a Function Space Setup Style Report 494
Function Space Setup Style Report Fields 494

About the Diary Report 495
Generating and Printing a Diary Report 497
Diary Report Fields 499

About the FSI New Bookings Report 501
Generating and Printing an FSI New Bookings Report 503
FSI New Bookings Report Fields 504

Index

1 What's New in This Release

What's New in Siebel Hospitality Guide, Version 8.0, Rev. A

Table 1 lists changes described in this version of the documentation to support release 8.0 of the software.

Table 1. New Product Features in Siebel Hospitality Guide, Version 8.0, Rev. A

Topic	Description
"Creating Sleeping Rooms" on page 65	Generic sleeping room types can be mapped to multiple property specific sleeping room types. An administrator can assign a percentage to each mapped property specific sleeping room type to specify how many rooms of each type to reserve.
Chapter 7, "Setting Up Property-Specific Menus and Packages"	A new chapter has been added to describe the administration of property-specific menus and packages.
"Manually Applying a Negotiated or Discount Price to Line Items" on page 271	Field name has been changed from Discount Price to Negotiated Price in function line items.
"Tentative/Not Tentative Button" on page 323	In the Total Group Availability view, users can toggle the display of records that have a tentative status.
Chapter 20, "Managing Property-Specific Menus and Packages"	A new chapter has been added to describe the management and use of property-specific menus and packages.
"Icons in the Function Space Diary" on page 387	Icons have been added to the Function Space Diary to designate holidays, special events, and sell notes.
"Color Coding in the Function Space Diary" on page 389	Customizable color coding indicators differentiate between weekdays, weekends, and holidays in the Function Space Diary.
"Time Scale" on page 389	New display values have been added to the Time Scale option in the Function Space Diary.
"Display" on page 390	Enhancements to ToolTips in Function Space Diary. Users can modify and abbreviate ToolTip text.
"Config Space Pattern Flag" on page 391	Users can toggle the display of configured spaces in the Function Space Diary.
"Storing User Preferences for the Function Space Diary" on page 393	Users can store preferences for information display controls in the Function Space Diary.
"Changing Bookings in the Function Space Diary" on page 397	Parameters are available to allow users to block function spaces directly from within the Function Space Diary.

Table 1. New Product Features in Siebel Hospitality Guide, Version 8.0, Rev. A

Topic	Description
"Navigating from the Function Space Diary" on page 403	Administrators can use Siebel Tools to configure the Function Space Diary so that users can click a blocked function in the Function Space Diary and navigate to the corresponding quote or function view.
"Calculation Rules for Generating and Displaying Event Checks" on page 457	The tables describing the rules for determining the calculations for event checks have been updated to describe property-specific menus and packages functionality.

This guide has also been updated to reflect product name and user interface changes. It was previously published as *Siebel Hospitality Guide*, Version 7.8. For more information about changes to the user interface, see *Fundamentals*.

2 Overview of Siebel Hospitality

This chapter provides an overview of Oracle's Siebel Hospitality. It includes the following topics:

- About Siebel Hospitality on page 22
- Business Purposes of Screens in Siebel Hospitality on page 22
- Viewing Information on the Hospitality Home Page (End User) on page 25

About Siebel Hospitality

The hospitality industry provides venues for many kinds of events, including conferences, meetings, celebrations, seminars, and so on. Siebel Hospitality is designed to help event planners and event operations personnel within hospitality firms improve their efficiency when performing the following business tasks:

- Planning for all sizes of events, including large events that consist of multiple functions, such as lectures, workshops, demonstrations, banquets, and so on
- Reserving necessary space and equipment for each event function
- Ordering needed supplies for each event function
- Setting up for all event functions
- Providing promised goods and services during the event
- Billing accurately for goods and services provided during each event

Siebel Hospitality can be used along with other Siebel applications such as Siebel Sales, Siebel Call Center, and Siebel Service. Add-on modules to many applications are also compatible with Siebel Hospitality.

Business Purposes of Screens in Siebel Hospitality

Table 2 and Table 3 describe the administrator and end-user screens in Siebel Hospitality.

Purposes of Siebel Hospitality Administration Screens

Table 2 describes the business purposes served by administration screens that have been created or modified specifically for use in Siebel Hospitality.

Table 2. Purposes of Siebel Hospitality Administration Screens

Screen	Purpose
Assets	Used to enter information about individual assets that your organization has available, including where each asset is located.
Category Administration	Used to organize products (goods and services) into categories such as food and beverages, audiovisual equipment, and so on. Categories can be further divided into subcategories to allow each subcategory to be taxed appropriately. Category management is specific to Siebel Hospitality.
Data Administration	Used to define addresses, list of values (LOVs), sales assessment templates, and so on.
Function Space Administration	Used to define function space inventory and asset inventory display properties.

Table 2. Purposes of Siebel Hospitality Administration Screens

Screen	Purpose
Guest Conveniences Administration	Used to define airports and booking centers.
Pricing Administration	Used to specify a range of prices for each product or service you offer. In Hospitality, each price list can be designated for use at specific properties.
Product Administration	Used to define combinations of goods and services as product packages for events.
Property Administration	Used to set up properties and attributes for each property such as sleeping rooms, property styles, day parts, and so on.
Property Pricing Administration	Used to set up pricing information and additional details for each property such as function space pricing, sleeping room pricing, discounts, unavailable spaces, and so on.
Tax Service Admin	Used to specify charge codes, taxes, and service charges, and associate taxes with properties.

Purposes of Siebel Hospitality End-User Screens

Table 3 describes the business purposes served by end-user screens that have been created or modified specifically for use in Siebel Hospitality.

Table 3. Purposes of Siebel Hospitality End-User Screens

Screen	Purpose
Accounts	Used to create and manage account information.
Activities	Used to create and manage activities.
Calendar	Used to manage a user's days, weeks and months.
Contacts	Used to create and manage contact information.
Evaluations	Used by revenue managers to review submitted quotes. Evaluation records can be viewed by property or across all organizations.
Event Checks	Primarily a read-only screen used to retrieve more detail about the generated event check. Also can be used to void an invoice.
Function Space Diary	Displays a Gantt chart that shows function space bookings over periods that are configurable. For example, the user can filter the data shown by start date and time scale.
Functions	Used to review, add, and modify information about functions within proposed and accepted events, including line items for needed goods and services. Also allows users to reserve assets such as audiovisual equipment for specific functions. All views for the Functions screen are specific to Siebel Hospitality.

Table 3. Purposes of Siebel Hospitality End-User Screens

Screen	Purpose
Home	A combination of sectioned lists that provides a snapshot of the most important information the user needs to manage a daily workload. The Home screen also provides quick links to opportunities, quotes, orders, invoices, and activities.
Opportunities	Used to create opportunities as well as add or modify information about proposed and accepted events.
Orders	Used to specify actual goods and services supplied during an event. Also used to generate trial checks and finalize the charges that appear in event invoices.
Property	Used to display detailed property information including inventory, quotes, opportunities, sell notes, and so on.
Quotes	Used to modify property-specific quotes and create new quotes.
Room Blocks	Used to display all room block line item records for the property with which the user is associated.
Turnover Evaluations	Used to display details of turnovers. Allows an event manager to conduct a detailed analysis of the turnover checklist questions and look at quote details by drilling down on the Quote field.

Viewing Information on the Hospitality Home Page (End User)

When a user logs in to the Siebel Hospitality application, the Hospitality home page appears. The home page is a combination of lists that provides a snapshot of the most important information that the user needs to manage a daily workload.

The purpose of the home page is to alert users to recent status changes and provide quick access to other views with additional functionality. When users click a link within the record, they are automatically navigated to the record's detail form and associated view tabs. For example, selecting a record in the My Opportunities list and then clicking the link in the Opportunity Name link takes the user to the opportunity's detail form and associated view tabs.

The home page only displays the information for which the user has visibility permission, based on the user's profile. Depending on the type of user, the Hospitality home page can include the following lists:

- My Opportunities
- My Quotes
- My Evaluations
- My Turnover Quotes
- All Orders
- All Event Checks
- My Current Activities
- My Transferred Quotes

The user can configure the home page to customize the information that appears. For example, the number of records displayed in each list on the home page can be configured. Lists on the home page typically display five records; users can scroll to additional records.

The user can also edit the home page layout to specify which sections are displayed. These changes remain in effect until new changes are made. For more information on home page layout controls, see *Fundamentals*.

Figure 1 shows the Hospitality home page, with a personalized welcome for the logged-in user, the My Opportunities and My Quotes lists, and the user's personal Calendar.

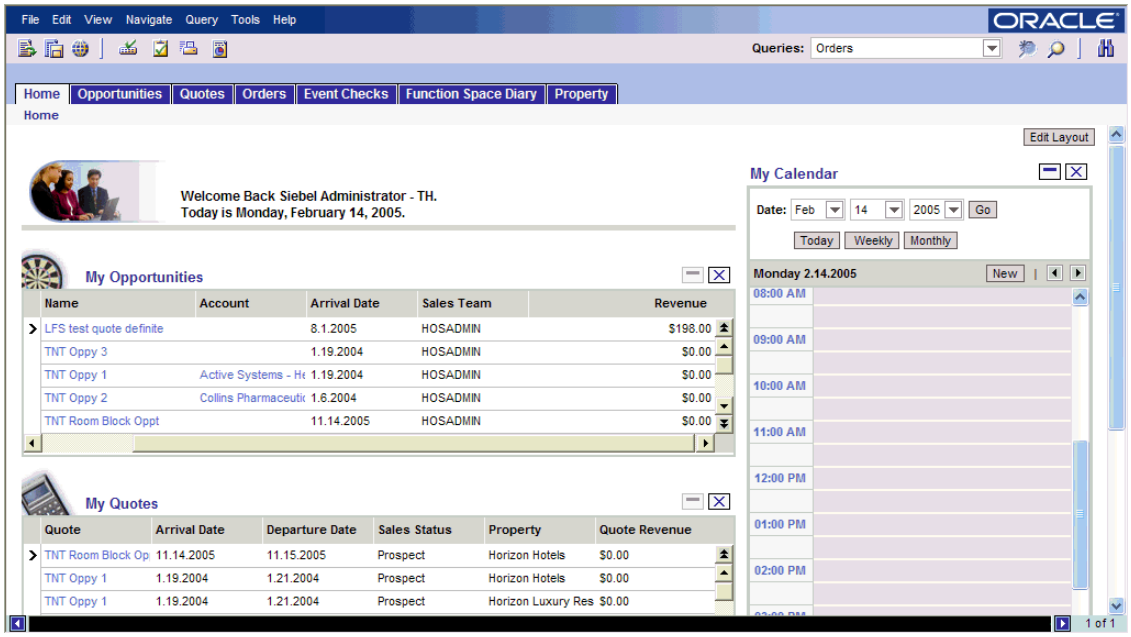


Figure 1. Siebel Hospitality Home Page

3 Getting Started with Siebel Hospitality

This chapter lists the application administration tasks that are specific to Siebel Hospitality. It includes the following topics:

- Administrator Setup Tasks on page 27
- Hospitality Workflow Processes on page 29
- Verifying Hospitality Workflows Are Active on page 31

Use this chapter in combination with *Siebel Applications Administration Guide*, *Siebel Product Administration Guide*, and *Siebel Pricing Administration Guide*.

Siebel Applications Administration Guide covers the setup tasks that are common to all Siebel Business Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information that you need to perform data administration and document administration tasks.

Some tasks discussed in this chapter may replace the corresponding ones in the administration guide, whereas others may be additional tasks. Make sure you review Table 4 before following the procedures in *Siebel Applications Administration Guide*.

This chapter assumes that you have already installed or completed the upgrade of Siebel Hospitality. and created the Siebel Administrator account that is used to perform the tasks described in this guide. For more information, see *Siebel Installation Guide* for the operating system you are using. If you are upgrading, see *Siebel Database Upgrade Guide*.

Administrator Setup Tasks

Table 4 lists and describes the administrative setup tasks that are specific to Siebel Hospitality and the tasks that may differ from those of other Siebel Business Applications. The table also directs you to documentation that provides information about each task.

Before setting up Siebel Hospitality, you must perform general Siebel application setup procedures, such as adding employees, assigning positions and responsibilities, setting visibility rules, and so on. For more information about the user authentication environment and how visibility works, see *Siebel Security Guide*.

Table 4. Administrative Setup Tasks

Administrative Task	Description	For More Information
Workflow Process activation	SHM Workflow business processes must be active for quotes and invoice creation.	Hospitality Workflow Processes on page 29 *Siebel Business Process Framework: Workflow Guide*
Assignment Manager	Set up Assignment Manager to automate the assignment of event-related activities to a person or team of people based on specific assignment rules. Assignments rules can be based on any combination of criteria, including business workflow policies, employee skills, workload, and territory or account team definitions.	*Siebel Assignment Manager Administration Guide*
Property Administration	Set up property records and property characteristics.	Chapter 4, "Setting Up Properties"
Function Space, Sleeping Room and Suites Administration	Create function space, sleeping room and suite records, and property-specific setup styles.	Chapter 5, "Setting Up Function Spaces, Sleeping Rooms, and Suites"
Product Administration	Set up product lines for sleeping rooms and generic catering products.	*Siebel Product Administration Guide*
Product and Asset Administration	Group products into parent categories, child categories, and subcategories. Define generic catering products, room blocks, and assets.	Chapter 6, "Setting Up Products and Assets" *Siebel Product Administration Guide*
Inventory Control Administration	Set up function space, sleeping room and suite inventory controls.	Chapter 8, "Setting Up Inventory Controls"
Function Space Administration	Set up a property's day parts, status indicators, and translations.	Chapter 9, "Defining Day Parts, Status Indicators, and Setup Style Translations"

Table 4. Administrative Setup Tasks

Administrative Task	Description	For More Information
Tax Code, Service Charge and Charge Code Administration	Set up tax codes, service charges, and charge codes for the property.	Chapter 10, "Setting Up Charge Codes, Taxes, and Service Charges" *Siebel Pricing Administration Guide*
Product and Property Pricing Administration	Create price list for each property. Define the rates for function space, sleeping rooms, and suites. Set profit thresholds and pricing discounts.	Chapter 11, "Setting Up Pricing and Property Pricing"
Set Up Event Templates	Create opportunity and quote event templates for event types that occur on a regular basis.	Chapter 12, "Defining Event Templates"
Create contact and account records	Define Hospitality accounts and contacts.	*Siebel Applications Administration Guide*
Set Up Proposal Generator	The proposal generator automatically creates agreement proposals from selected quotes.	*Siebel Applications Administration Guide*
Set Up Turnover Template	Use the Sales Assessment Template view to create a template for turnover tasks.	*Siebel Applications Administration Guide*
Set Up Report Headers	Create customized headers to be used with Hospitality reports.	"Configuring Reports" on page 465

Hospitality Workflow Processes

The setup process includes activating a set of default workflows that are included in the Siebel Hospitality application. This process should be completed before the application becomes available to the user.

CAUTION: If this setup process is skipped, although much of the application is still operable, some functionality does not work properly. For example, Create Quote does not automatically generate quotes for the specified properties unless the workflow is active.

There are 13 workflow processes that need to be activated. These workflow processes help carry out some of the functionality behind the scenes. For more information about workflow processes, see *Siebel Business Process Framework: Workflow Guide.* The workflow processes are defined as follows:

- **SHM Go to View.** This workflow process allows navigation to a certain view. The workflow is not called directly; it is a subprocess that is called from other workflows.
- **SHM Open Check.** This workflow process checks if the selected order is associated with an event check. If not, it creates an event check with no line items.

- **SHM Open Checks.** This workflow is similar to the SHM Open Check workflow. It is called from the business service SHM Invoice Process, rather than directly.
- **SHM Post Check.** This workflow process checks whether or not the selected order is associated with an event check. If the order is associated with an event check, then it deletes the line items in that event check and creates new line items along with line items for each tax and service charge, and sets the event check status to Posted.
- **SHM Post Checks.** This workflow is similar to SHM Post Check. It is called from the business service SHM Invoice Process, rather than directly.
- **SHM Trial Check.** This workflow is similar to SHM Post Check, except that the Event Check status is set to Trial. It is called directly.
- **SHM Voiding Process.** This workflow is called when the event check status is changed to Voided. It creates a new event check with a status of Open and associates the check with the order.
- **TNT SHM Create Order.** This workflow process creates a primary order for the selected quote and associates all quote functions to this order. In addition, all quote function line items are copied to order line items. The transformation from quote to order is performed by the Data Transfer Utilities (DTU), which are dynamically configured in the UI.
- **TNT SHM Create Quote.** This workflow process creates a quote for the property associated with an opportunity and selected by the user. Agenda Functions, Room Blocks, and other objects are copied to the quote, and the process also invokes the Function Space Inventory (FSI) engine to find a function space that best meets the attributes of each function. In addition, the quote's total price and expected revenue are calculated during this process. The transformation from quote to order is performed by the Data Transfer Utilities (DTU), which are dynamically configured in the UI.
- **TNT SHM Optioned Booking Expiry.** This workflow sends an email to the owner of an Option Reserved booking to accept the booking. If the booking is not accepted within a predefined time frame, the workflow changes the status of the booking to Unreserved.
- **TNT SHM Release Inventory in Quote Prospect Status.** This workflow, after a predefined amount of time passes, checks the Status field on the quote record. If the Status field value is still Prospect, the workflow process automatically updates the Inventory Status to Unreserved for both Functions and Sleeping Rooms associated to the quote. The inventory is released. However, the Status field for the Functions and Sleeping Rooms remains Prospect.
- **TNT SHM Update Quote Status-Date Based.** When the Decision Date field is completed in the quote, the second background process begins. When the Decision Date passes, and the quote status has not changed to Definite, the system automatically releases all inventory. This inventory includes Function Space Inventory and Room Block Inventory.
- **TNT SHM Update Quote Status-Time Based.** This workflow checks if the quote status is T1 after a predefined amount of time passes. If the status is T1, the system automatically releases the inventory.

Related Topics

- Verifying Hospitality Workflows Are Active on page 31
- Administrator Setup Tasks on page 27

Verifying Hospitality Workflows Are Active

Perform the following steps to verify that the status of each Hospitality workflow process is active.

This task is a step in Administrator Setup Tasks on page 27.

To verify that Hospitality workflows are active

1. From the application-level menu, choose Navigate > Site Map > Administration - Business Process > Workflow Processes.
2. In the Workflow Processes list, query for the query for all workflows that contain the string SHM (use the query string *SHM*).
3. Validate that the Status field in each workflow is set to Active.

NOTE: Workflows are activated from the Administration - Business Process > Workflow Deployment screen. For more information, see *Siebel Business Process Framework: Workflow Guide*.

Related Topic

Hospitality Workflow Processes on page 29

4 Setting Up Properties

This chapter describes administrator setup of Hospitality properties. It includes the following topics:

- About Hospitality Properties on page 33
- Process of Setting Up Properties on page 34
- Defining Airports and Booking Centers on page 34
- Creating Addresses for Properties on page 35
- Setting Up Guest Conveniences on page 35
- Adding Property Records on page 36
- Setting Up Nonparticipating Properties on page 39
- Defining Property Facilities and Room Service Attributes on page 40
- Defining Property Day Parts on page 40
- Updating the Property Team on page 41
- Defining the Property's Neighborhood Characteristics on page 42
- Defining the Property Profile on page 43
- Defining Property Policies on page 44
- Adding Property Floor Plans on page 46
- Creating Sell Notes for a Property on page 48
- Setting Up Special Dates for a Property on page 49
- Viewing the Property Calendar on page 50
- Setting Up Property Clusters on page 50

About Hospitality Properties

A hospitality property is the location where an event takes place. For example, a property may be a hotel where a customer has a number of rooms booked, or wishes to hold a function. You may use hospitality properties to store details about the layout, policies, neighborhood, and so on, of your property.

By profiling a property and its details, including sleeping room and function space availability, you allow the property to be selected as a possible location for opportunities with customers. When opportunities are progressed, the properties that meet the customer requirements can be presented to the customer as quotes.

Process of Setting Up Properties

This topic lists the tasks typically performed by administrators when setting up properties. Your company may follow a different process according to its business requirements.

To set up properties, perform the following procedures:

1 Defining Airports and Booking Centers on page 34

2 Creating Addresses for Properties on page 35

3 Setting Up Guest Conveniences on page 35

4 Adding Property Records on page 36

5 Setting Up Nonparticipating Properties on page 39

6 Defining Property Facilities and Room Service Attributes on page 40

7 Defining Property Day Parts on page 40

8 Updating the Property Team on page 41

9 Defining the Property's Neighborhood Characteristics on page 42

10 Defining the Property Profile on page 43

11 Defining Property Policies on page 44

12 Adding Property Floor Plans on page 46

13 Creating Sell Notes for a Property on page 48

14 Setting Up Special Dates for a Property on page 49

15 Viewing the Property Calendar on page 50

16 Setting Up Property Clusters on page 50

NOTE: This process is carried out as much as possible for nonparticipating properties. That is, all information available to you about NPPs should be used to build up the property's profile.

Defining Airports and Booking Centers

Before a property record is created, an administrator defines airports and booking centers that are referenced in the property record.

This task is a step in Process of Setting Up Properties on page 34.

To define an airport and a booking center

1 Navigate to the Guest Conveniences Administration screen > Guest Conveniences list view.

2 In the Guest Conveniences list, create new records, and complete the fields for each record as follows:

- For an airport record, set the value in the Type field to Airport.

- For a booking center record, set the value in the Type field to Booking Center.

Creating Addresses for Properties

Before a property record is created, an administrator must define the address for the property.

This task is a step in Process of Setting Up Properties on page 34.

To create an address for a property

1. Navigate to the Administration - Data screen > Zip Code Administration list view.
2. In the Zip Code Administration list, verify that you enter valid data for all ZIP Codes. For more information about administering ZIP Codes, see *Siebel Applications Administration Guide*.

   NOTE: If you do not have valid data for ZIP Codes, you will not be able to associate an address with a property.
3. Navigate to the Administration - Data screen > Addresses list view.
4. In the Addresses list, create an address record for each property, complete the fields, and save the record.

Setting Up Guest Conveniences

Guest conveniences are amenities that are in close proximity to the property that may be useful to guests during their stay at the property. Guest conveniences can include local airports, restaurants, booking centers, attractions, and other local companies. This information may be useful to guests who are staying at your property. However, before guest conveniences can be associated with the property record, they must be added to the system. The following procedure details how to set up guest conveniences in your system. For more information about associating guest conveniences with a property record, see Defining the Property's Neighborhood Characteristics on page 42.

This task is a step in Process of Setting Up Properties on page 34.

To add guest conveniences

1. Navigate to the Guest Conveniences Administration screen > Guest Conveniences list view.
2. In the Guest conveniences list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Name	Enter the name of the guest convenience.
Type	Select the type of convenience, that is, either Airport, Booking Center, Restaurants, Local Companies, or Attractions.
Address1	Enter the street address of the guest convenience.

Field	Comments
Address2	Enter the remainder of the street address of the guest convenience.
City	Enter the name of the city in which the guest convenience is located.
State	Enter the name of the state in which the guest convenience is located.
Zip/Postal Code	Enter the ZIP or postal code of the guest convenience.
Country	Enter the name of the country in which the guest convenience is located.
Description	Enter a description of the guest convenience.
Driving Directions	Enter the driving directions from the property to the guest convenience.

Adding Property Records

After airports, booking centers, and addresses are created, an administrator can use the Property Administration screen to add properties.

This task is a step in Process of Setting Up Properties on page 34.

To add a property record

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, create a record, complete the required fields, and save the record.
3. Click the show more button to view more fields.

   The following table describes some of the fields.

Field	Comments
# of Guest Rooms	The number of guest rooms at the property.
# of Meeting Rooms	The number of meeting rooms at the property.
AAA Diamond	The AAA Diamond rating of the property. AAA Diamond is an industry-recognized rating system for lodging products.
Airport Shuttle Service	Indicates whether or not there is a shuttle bus from the property to the airport.
Airports	Select one or more airports from a predefined list. For more information about adding airports, see Setting Up Guest Conveniences on page 35.

Field	Comments
Alternate Transportation	Create one or more alternate means of transport to and from the property using the multi-value picklist. For the alternative transport, you must specify the following information: ■ Mode of transport ■ Description of the alternate transport ■ The fee for the transport ■ Whether or not the customer must reserve the transport prior to use
Area UOM	The unit of measure that should be used for the property (square feet or square meters).
Booking Centers	The reservation booking centers associated with a property. Booking centers are defined in the Guest Conveniences Administration screen.
Brand	The property's corporate brand.
Bus Parking	Indicates whether or not parking for buses is available at the property.
CRS Code	The property's Central Reservation System code.
Currency	The currency used by the property.
Default Product Category	Product catalog category associated with this property as the default. All products in this category are automatically available to the property.
Description	A description of the property.
Downtown Distance	The distance in kilometers to the nearest retail center. You can enter a number to this field.
Driving Directions	Instructions on how to drive to the property.
Execution System	The event management system that is installed at the property.
Largest Space	The name of the meeting room with the largest physical area.
Main Fax #	The main fax number at the property.
Main Phone #	The main phone number at the property.

Field	Comments
Market Tier	Classification of property based on type of customer that the property caters to. Examples are: ■ Luxury ■ Quality ■ Moderate ■ Economy ■ Extended Stay
Mobile Star	The Mobile Star rating of the property. Mobile Star is an industry-recognized rating system for lodging products.
Nearest Airport	Select the nearest airport from a predefined list. You cannot select an airport in this field unless you have first added airports to the Airports field.
Nearest Airport Distance	This value is automatically populated based on the selection in the Nearest Airport field.
Nearest Major City	The nearest major city to the property.
Nearest Major Highway	The nearest major highway.
Neighborhood Location	Select the value that generally describes the neighborhood. For example, urban, suburban, and rural.
Non-Participating	The property is considered nonparticipating, and availability and pricing checks are not performed for the property.
Opening Date	The date the property opened (or is expected to open) for business.
Pre-Open	Indicates that the property is not yet open, but event sales are underway for future dates.
Price List	The price list associated with this property. This price list becomes the default price list for events held at the property and is automatically associated with any orders and quotes created for the event. For more information, see *Siebel Pricing Administration Guide*.
Property	The property name.
Property Team	The team assigned to this property location. The primary team member defaults to the user creating the property record. For more information about property teams, see Updating the Property Team on page 41.
Property Type	The type of property. For example, Resort, Extended Stay, or Meeting/Convention. The default is Corporate/Transient.

Field	Comments
Service Level	The service level of the hotel. For example, Extended Stay, Full Service, or Limited Service.
Shuttle to Downtown	Indicates whether or not there is a shuttle bus from the property to the downtown area.
Time Zone	The time zone in which the property is located.
Total Floors	The total number of floors in the property.
Web Address	The Web site address (URL) for the property.
Weekend-Weekday	This check box flag is used for weekend-weekday pricing purposes. This controls whether or not weekend rates will be used.
Year Built	The year that the property was constructed.

Setting Up Nonparticipating Properties

Nonparticipating properties (NPPs) are properties that do not use the Hospitality Event Sales Execution, Central Reservation System, or Function Space Inventory processes. However, events for these properties may be sold by a member of the property brand and the National Sales Organization (NSO). Event Booking Centers (EBC) sell space from and pass event opportunities to NPPs.

For more information about nonparticipating properties, see Chapter 21, “Managing Nonparticipating Properties.”

The following procedure details how to create nonparticipating properties.

This task is a step in Process of Setting Up Properties on page 34.

To create a nonparticipating property

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, create a record, and check the box in the Non-Participating field.
3. Complete the remaining fields, and save the record. For more information about these fields, see Adding Property Records on page 36.
4. After you have flagged this as a nonparticipating property, it is advised that you create one sleeping room for the property, and map it to a generic room block. For more information, see Creating Sleeping Rooms on page 65 and Mapping Generic Room Blocks to Property-Specific Room Types on page 89 respectively.
5. It is also advised that you create one function space for the property. For more information, see Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

Defining Property Facilities and Room Service Attributes

After the property record is defined, the administrator can specify the facilities and room service attributes for the property.

This task is a step in Process of Setting Up Properties on page 34.

To define property facilities

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property name field, and then click the Facilities view tab.
4. In the Facilities form, select the check boxes for each amenity at the facility.

To define room services

1. Navigate to the Property Administration screen Properties list view.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property Name field, and then click the Room Services view tab.
4. In the Room Services form, select the check boxes for each room service amenity at the property.

Defining Property Day Parts

After the property record is defined, an administrator sets up the property's day parts, segmenting the operational day into periods of time.

This task is a step in Process of Setting Up Properties on page 34.

To set up day parts

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property Name field, and then click the Day Parts view tab.

4 In the Day Parts list, create new records, complete the fields for each record, and save the records.

The following table describes some of the fields.

Field	Comments
Day Part Name	The name of the day part. For example, Morning.
Start Time	The start time of the day part. For example, 6 A.M.
End Time	The time that the day part ends. For example, 12 P.M.
Include in Full Day Threshold	This check box is used for Full Day discounts. Select it if the day part is to be a part of the Full Day Threshold. ■ If this check box is selected, then any functions may not qualify for a full day discount unless the function touches this day part. ■ If this check box is not selected, then functions may qualify for a full day discount without touching this day part.
Comments	Add any relevant comments about the day part.

NOTE: Day parts can span over two different days. For example, a day part might run from 10 P.M. until 3 A.M. However, day parts must only span one 24-hour time period.

To validate day parts

1 Navigate to the Property Administration screen > Properties list view.

2 In the properties list, select the required property, and click the link in the Property Name field.

3 Click the Day Parts view tab.

4 Select the first day part in the list, and click Validate.

- If there are any gaps or overlaps between the day parts, a dialog box appears prompting you to recheck the day-part definitions.
- If the day parts are validated, then the last day part in the list is selected after the validation.

Updating the Property Team

After a property is defined, individual employees are assigned to a team that is associated with the property.

This task is a step in Process of Setting Up Properties on page 34.

To assign an employee to a property team

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for and select the required the property record.

3 Click the link in the Property Name field, and then click the More Info view tab.

4 In the More Info view, click the show more button, and scroll to the Detailed Specifications section of the form.

5 In the Property Team field, click the select button.

6 In the Property Team Members dialog box, query for and select the team member.

7 In the Selected list, select the Primary check box in the primary team member record, and then click OK.

To remove an employee from a property team

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for and select the required property record.

3 Click the link in the property Name field, and then click the More Info view tab.

4 In the More Info view, click the show more button, and scroll to the Detailed Specifications section of the form.

5 In the Property Team field, click the select button.

6 In the Property Team Members dialog box, select the team member in the Selected list.

7 Click Remove, and then click OK.

Repeat Step 6 and Step 7 for each member you want to remove.

Defining the Property's Neighborhood Characteristics

By defining the property neighborhood, the administrator can give sales representatives a snapshot of the surrounding location to any given property. This description may help sales representatives when they are developing opportunities with customers.

This task is a step in Process of Setting Up Properties on page 34.

To define a property's neighborhood characteristics

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for the required property record.

3 Click the link in the Property Name field.

4 Click the Neighborhood view tab, and in each of the four list applets on the tab, add the appropriate new records.

The following table describes the four list applets that appear in the Neighborhood view tab for the property.

List Applet	Comment
Competitors	A list of the property's competitors. This is a list of other properties with which your property may be in competition. You can select any property defined in the system.
Key Local Companies	A list of important companies in the area.
Area Restaurants	Restaurants in close proximity to the property.
Other Attractions	Any other attractions that may be of interest to the customer.

NOTE: For information about adding these types of companies to the system, see Setting Up Guest Conveniences on page 35.

5 In each of the list applets, add the appropriate records.

6 Select a record from the picklist to associate with the property, and click OK, or create a new record.

Defining the Property Profile

The property profile can be used to capture details, such as, occupancy information, ownership, renovation information, credit cards accepted, and season information, for a property.

This task is a step in Process of Setting Up Properties on page 34.

To define the property profile

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for and select the required property record.

3 Drill down on the Property Name hyperlink.

4 Click the Profile view tab.

5 In the Profile form applet, complete the fields displayed.

The following table describes some of the fields.

Field	Comments
Franchised By	The person or group who have franchised the property.
Last Common Area Renovation	Most recent year that the common room was renovated.
Last Room Renovation	Most recent year that the guest rooms were renovated.

Field	Comments
Managed By	The person or group who manages the property.
Owned By	The person or group who owns the property.
Total Doubles	Total number of guest rooms that have double beds.
Total Floors	Total number of floors at the property.
Total Kings	Total number of guest rooms that have king-size beds.
Total Non Smoking	Total number of nonsmoking guest rooms at the property.
Total Queens	Total number of guest rooms that have queen-size beds.
Total Suites	Total number of suites at the property.
Renovation Description	A description of the last renovation at the property.

6 In the Credit Card list, create the appropriate records for the credit cards that are accepted for payment by the property.

7 In the Seasons list, create records for the Peak Season and Off Peak season, specifying the start and end dates for these seasons.

Defining Property Policies

Defining property policies helps sales representatives to provide details, such as check-in and check-out information, cancellation information, oversold information, and so on to the customer. When policies are defined, the sales representative is able to handle situations as they arise with the information provided.

There are two policy lists that can be used to define policies as follows:

- Oversold Policies. Oversold policies define what a sales representative should do when a room or function space at the property has been oversold. It is important to define these policies so that the sales representative immediately knows what to do to avoid any inconvenience for the customers.
- General Policies. General policies allow you to enter policies other than oversold information. This includes cross-selling policies, cancellation information, and so on.

NOTE: The policies detailed in the Policies view are for information purposes only and do not drive any other functionality in Siebel Hospitality.

This task is a step in Process of Setting Up Properties on page 34.

To define property policies

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for the required property record.

3 Drill down on the Property Name hyperlink.

4 Click the Policies view tab.

5 In the Policies form applet, complete the fields displayed.

The following table describes some of the fields.

Field	Comments
Check In	The time that guests may check in at the front desk.
Check Out	The time that guests must vacate their rooms on the day of departure so that housekeeping may clean the room for future arrivals.
Incoming Fax Charges	The charges levied on incoming faxes to the hotel.
Local Phone Charges	The charges levied for local phone calls from the hotel.
Outgoing Fax Charges	The charges levied on outgoing faxes from the hotel.
Parking Fee	The fee levied for parking at the hotel.
Sales Parameter	Records the sales strategy for different types of bookings. These parameters act as guidelines for the types and sizes of rooms, and how these rooms are sold.
Valet Parking Fee	The fee levied for valet parking at the hotel.

6 In the Oversold Check list, create a new record, and add a new oversold policy and its description for the property.

There are five oversold policies as described in the following table.

Policy	Comment
Arrange Accommodation	This policy indicates that the property arranges accommodation for the guest whose room is oversold.
Pay For One Night Room/Tax	This policy indicates that the property pays for a room and its tax for one night at an alternate location for the guest whose room is oversold.
Provide Transportation	This policy indicates that the property provides transportation to an alternate property to the guest whose room is oversold.
Provide One Phone Call	This policy indicates that the property provides one phone call to the guest whose room is oversold.
Direct Billing Can Be Arranged	This policy indicates that the property can provide direct billing facilities to the guest whose room is oversold.

7 In the Policies list, create a new record, and add a new policy and its description.

There are seven general policies as shown in the following table.

Policy	Comment
Business Mix	This policy details the historical mix of businesses for this property, for example, whether the property is generally driven by local business or group businesses.
Opportunity Policies	This policy provides general details for managing opportunities at this property, for example, complimentary rooms provided, director's approval, and so on.
Sleeping Room Policies	This policy details general rules on upgrade at the property.
Special Property Policies	This policy provides information on rules that are out-of-the-ordinary, for example, smoking in meeting rooms, no pets allowed, and so on.
Cancellation Policy	This policy details how room cancellations are handled.
Cross Selling Policy	This policy provides information on how to cross sell other properties to customers if a function space is not available at this property.
Future Year Booking Policy	This policy details the percentage increase in quotes for the year to come.

Adding Property Floor Plans

The administrator can attach floor plans for each property or part of the property to the property record. This access to floor plans allows sales representatives to make informed decisions about the suitability of a function space for a particular function simply by looking at the floor plan.

This task is a step in Process of Setting Up Properties on page 34.

To attach a floor plan to a property

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for the required property record.

3 Drill down on the Property Name hyperlink.

4 Click the Floor Plans view tab.

5 In the Floor Plan list, create a new record, and complete the fields.

The table that follows describes some of the fields.

Field	Comments
Name	Name of the floor plan for the function space.
Description	Description of the floor plan.
Image File Name	Actual floor plan image. Click the Select button to attach an image from the picklist. If you have a new floor plan that has not yet been made available in this list, you may do so by adding a New Literature item of type Bitmap or Thumbnail Image. For more information on adding literature records, see *Siebel Applications Administration Guide*.
Image File Type	Type of the floor plan image, that is, Bitmap or Thumbnail Image.
Thumbnail Image File Name	Thumbnail image of the floor plan.
Thumbnail Image File Type	Type of the floor plan thumbnail image, that is, Bitmap or Thumbnail Image.

After you create the Floor Plan list, sales representatives can view the floor plan using the Floor Plan view tab for the property.

To allow floor plan viewing for the Function Space Diary

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for and select the required property record.

3 Drill down on the Property Name hyperlink.

4 Click the Floor Plans view tab.

5 Click the Show more button on the Property form, and locate the Image Information section.

6 In the Thumbnail Image File Name field, click the Select button, and choose the thumbnail graphic file.

After you select a graphic file in this field, the Thumbnail Floor Plan option (available from the Function Space Diary view menu button) is made available for use.

7 In the Image File Name field, click the Select button, and choose the appropriate floor plan graphic file.

After you select a graphic file in this field, the Floor Plan button (on the Function Space Diary Property form) is made available for use.

Configuring the Floor Plan Website Option

The Function Space Diary also has a Floor Plan Website option. This must be configured by the administrator in Siebel Tools before it is available to the users.

To configure the Floor Plan Website option

1. Log in to Siebel Tools as an administrator.
2. In the Object Explorer, navigate to Applet.
3. Query for TNT SHM Site Entry Applet 1 Row.
4. Navigate to Applet > User Prop.
5. Query for the Main Url Field Applet User Prop.
6. Clear the Inactive check box to activate the applet user property.
7. Under Value, define the Web site that you want to appear when the users choose the Floor Plan Website option.
8. Recompile and replace the Siebel Repository File (SRF).
9. Restart the client and check that the option is now available from the Function Space Diary.

For more information about configuring with Siebel Tools, see *Using Siebel Tools*. See Viewing Floor Plans in the Function Space Diary on page 396 for more information on how floor plans are used in the Function Space Diary.

Creating Sell Notes for a Property

Sales managers can flag days as high-priority for event sales, and add *sell notes*, which describe the sales strategy that the property is implementing. More than one sell note can be entered against a date. The Sell Notes automatically appear in the Special Dates calendar. For more information, see Viewing the Property Calendar on page 50.

NOTE: Sell Notes should only be defined using the Property screen's Sell Notes view.

This task is a step in Process of Setting Up Properties on page 34.

To create sell notes

1. Navigate to the Property screen > Properties list view.
2. In the Properties list, query for the required property record.
3. Drill down on the Property Name hyperlink.
4. From the Property form, click the Sell Notes view tab.

5 In the Sell Notes list, create a record, and complete the fields.

The following table describes some of the fields.

Field	Comments
Start Date	Start date of the sell note.
End Date	End date of the sell note.
Type	Designates the record type. This is defaulted to Sell Notes, and only records of this type are displayed in this view.
Description	Description of the sell note.
Created By, Created Date	The login of the person creating the sell note and the date the record was created.
Last Updated By, Updated Date	The login of the person who last updated the sell note and the date the record was updated.

Setting Up Special Dates for a Property

Flagging certain days as special dates for a property alerts sales representatives that the revenue manager would like to generate extra revenue on the days in question. More than one Special Date per day can be set up at the property. Special Dates are typically set up by revenue managers.

This task is a step in Process of Setting Up Properties on page 34.

To set up special dates

1 Navigate to the Property Pricing Admin screen > Sell Notes list view.

2 In the Properties form, query for the required property record.

3 In the Sell Notes list, create a new record, and complete the fields.

The following table describes some of the fields.

Field	Comments
Start Date	Start date of the special dates period. Click the Calendar button in the field to change the date. After saving the record, click the link in the Start Date field to automatically navigate to the Special Dates Calendar. For more information, see Viewing the Property Calendar on page 50.
End Date	End date of the special date.
Type	Designates the type of record. Select the type to reflect the need at the property. Options include Need Sleeping Room, Need Function Space, Holiday, Sell Notes, Special Events, and Sales Strategy.
Description	Description of the special date.

Field	Comments
Created By, Created Date	The login of the person creating the special date record and the date the record was created.
Last Updated By, Updated Date	The login of the person who last updated the special date and the date the record was last updated.

To delete a special date

1. Navigate to the Property Pricing Admin screen > Sell Notes list view.
2. In the Properties form, query for the required property record.
3. Click the Sell Notes view tab.
4. In the Sell Notes list, select the special date record.
5. Click Delete.

Viewing the Property Calendar

The Property calendar shows quotes, special dates, and sell notes for a property. The user can view information in weekly and monthly formats, navigate to a different date, and print the calendar.

When users drill down on quotes, the quote's Summary view appears. When users drill down on sell notes links, the property's Sell Notes view appears. When users drill down on special dates, the property's Pricing Admin > Sell Notes view appears. For more information about quotes, see Chapter 17, "Managing Property-Specific Event Quotes."

This task is a step in Process of Setting Up Properties on page 34.

To view the Special Dates calendar

1. Navigate to the Property screen > Properties list view.
2. In the Properties list, query for the required property record.
3. Drill down on the Property Name hyperlink.
4. Click the Property Calendar view tab.

Setting Up Property Clusters

A *cluster* is a collection of individual properties that are grouped together for sales or revenue purposes. Properties may also be clustered if they are in close proximity to each other. Clustering may help with the sharing of assets between properties. Properties may be associated with many different clusters depending on the purpose of each cluster.

Clusters must be assigned to users before users can see them in the My Clusters list. If users have access to only one property in a cluster, they do not automatically have access to the other properties in that cluster.

Before you carry out this procedure, you must add a number of property records to be included in the cluster as described in Adding Property Records on page 36.

This task is a step in Process of Setting Up Properties on page 34.

To set up a property cluster, you must do the following:

1 Creating the Property Cluster on page 51

2 Assigning Clusters to a User on page 52

3 Using Cluster Visibility on page 52

Creating the Property Cluster

The following procedure details how to create a property cluster.

This task is a step in Setting Up Property Clusters on page 50.

To set up a property cluster

1 Navigate to the Clusters screen > Clusters list view.

2 In the Clusters list, create a new record, and complete the fields.

The following table describes some of the fields.

Field	Comments
Cluster Id	The identification number of the cluster. This field is automatically populated.
Description	A description of the purpose of the cluster.
Last Updated By	This field is read-only and is automatically populated with the User Id of the last person to update this record.
Last Updated Date	This field is read-only and is automatically populated with the date on which this record was last updated.
Name	The name of this particular cluster.
Type	Choose Revenue Cluster or Sales Cluster as the type.

3 Drill down on the Cluster Id hyperlink, and click the Properties tab.

4 In the Properties list, create a new record.

The Add Properties picklist appears.

5 Query for the property that you want to add to this cluster, select it, and click OK.

The details of this property are populated to the fields in the Properties list.

6 Add more properties to the list as required.

Assigning Clusters to a User

Before a user can have access a cluster of properties, the cluster must be assigned to that user. Users can have as many clusters as necessary assigned to them, and clusters can be assigned to many different users.

Before you carry out this procedure, you must create a cluster as described in Setting Up Property Clusters on page 50.

This task is a step in Setting Up Property Clusters on page 50.

To assign a cluster to a user

1. Navigate to the Administration - User screen > Employees list view.
2. In the Employees list, query for the user to whom you want to assign a cluster.
3. Scroll down to the Employee Details form and in the Clusters field, click the select button.
4. In the Available Clusters selection dialog box, query for and select the required cluster.
5. Click Add to add the Cluster to the employee's Selected Clusters list, and click OK.

   The user now has access to the selected cluster.

Using Cluster Visibility

The most important aspect of cluster visibility is the fact that a sales representative can view records for all properties in the cluster, even if that user does not have access to all of the properties. This allows users to be aware of opportunities, quotes, orders, and so on, that are occurring in all properties in the cluster. It also allows resources clustering for products at other properties.

This task is a step in Setting Up Property Clusters on page 50.

Table 5 details the screen views for which cluster visibility is available. For each of these views, the sales representative is able to view all records associated with properties in the cluster.

Table 5. Cluster Visibility Views

Screen Views	Description
Opportunity	Shows opportunities where the opportunity's primary projected property is within the clusters to which the user is assigned.
Quotes	Shows quotes for all properties in the clusters to which the user is assigned.
Orders	Shows orders for all properties in the clusters to which the user is assigned.
Event Checks	Shows event checks for all properties in the clusters to which the user is assigned.
Functions	Shows functions for all properties in the clusters to which the user is assigned.
Room Blocks	Shows room blocks for all properties in the clusters to which the user is assigned.
Property	Shows all properties in the clusters to which the user is assigned.

Table 5. Cluster Visibility Views

Screen Views	Description
Property Pricing Admin	Shows all properties in the clusters to which the user is assigned.
Evaluations	Shows evaluations for all properties in the clusters to which the user is assigned.
Turnover	Shows turnovers for all properties in the clusters to which the user is assigned.
Agreements	Shows agreements for all properties in the clusters to which the user is assigned.
Diary	Shows inventory for all properties in the clusters to which the user is assigned.
Sleeping Room Availability	Shows sleeping room inventory for all properties in the clusters to which the user is assigned.
Property Specific Event Templates	Shows all property-specific event templates for all properties in the clusters to which the user is assigned.
Property Administration	Shows all properties in the clusters to which the user is assigned.

To assign cluster visibility to a user

1. Assign the appropriate user to the property teams, as described in Updating the Property Team on page 41.
2. Assign the appropriate clusters to the user, as described in Assigning Clusters to a User on page 52.

   The user will now be able to view all records (described in Table 5) associated with the properties in that user's clusters.

   NOTE: Even if the user is not assigned to a particular property, that user will still have visibility for the records associated with that property, if the property is in the clusters that were assigned to the user. This means that records for that property will only be available in the Clusters visibility filter in the list of records, and not in any of the other visibility filters.

To view cluster records

1. Navigate to the appropriate screen view, for example, Quotes List view.
2. In the visibility filter for the list, click the drop-down arrow, and select the Clusters filter.

   The records associated with all properties in your clusters are displayed.

5 Setting Up Function Spaces, Sleeping Rooms, and Suites

This chapter describes how to set up function space, sleeping rooms and suites. It includes the following topics:

- Function Spaces, Sleeping Rooms, and Suites Administration on page 55
- Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56
- Creating Indivisible Specific Space on page 57
- Creating Configured Specific Space on page 58
- Creating Function Space Categories for a Property on page 59
- Marking a Specific Space as Requiring Backup on page 60
- Associating a Specific Space with Function Space Categories on page 61
- Configuring the Do Not Move Flag on page 62
- Defining Setup Style LOVs on page 63
- Creating Property-Specific Setup Styles and Associating Packages on page 63
- Associating Setup Styles with Function Space Categories on page 64
- Optimizing Setup Styles for Specific Spaces on page 65
- Creating Sleeping Rooms on page 65
- Process of Setting Up Suites on page 68

Function Spaces, Sleeping Rooms, and Suites Administration

Function spaces represent the physical areas within a property that are used for group events such as sales meetings, training sessions, weddings, and so on. Typical function spaces include meeting rooms, banquet rooms, ballrooms, the foyer, and other defined areas on the property grounds. Function space can have many characteristics, but during the booking process, the most important function space characteristics include:

- Setup style
- Minimum and maximum capacity defined for each setup style
- Physical area measured in square feet or square meters
- Usable area measured in square feet or square meters

Other characteristics such as the physical dimensions of the function space (ceiling height, cable TV, and so on) may be important when considering whether or not a function must occupy a specific room to meet customer requirements.

Specific space represents the function rooms that are physically located at a property. Specific space usually has a name, for example, the Golden Gate Salon. There are two types of specific space, Indivisible Space and Configured Space.

Figure 2 shows the typical process when setting up function space and sleeping rooms. Each process step in the flow is described in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

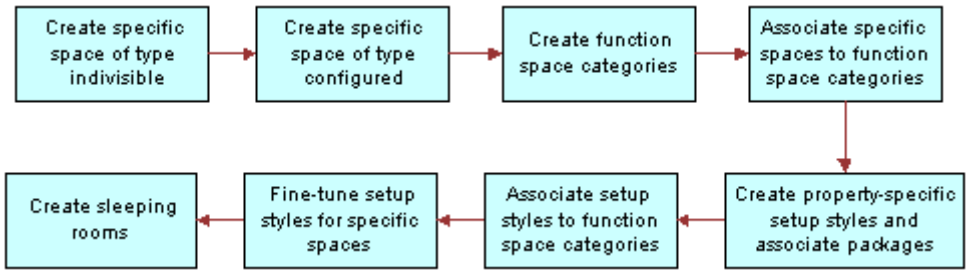


Figure 2. Function Space and Sleeping Room Administration

Process of Setting Up Function Spaces, Sleeping Rooms, and Suites

This topic lists the tasks typically performed by administrators when setting up function spaces, sleeping rooms and suites. Your company may follow a different process according to its business requirements.

To set up function spaces, sleeping rooms, and suites, perform the following procedures:

1. Creating Indivisible Specific Space on page 57
2. Creating Configured Specific Space on page 58
3. Creating Function Space Categories for a Property on page 59
4. Marking a Specific Space as Requiring Backup on page 60
5. Associating a Specific Space with Function Space Categories on page 61
6. Configuring the Do Not Move Flag on page 62
7. Defining Setup Style LOVs on page 63
8. Creating Property-Specific Setup Styles and Associating Packages on page 63
9. Associating Setup Styles with Function Space Categories on page 64
10. Optimizing Setup Styles for Specific Spaces on page 65
11. Creating Sleeping Rooms on page 65
12. Process of Setting Up Suites on page 68

Creating Indivisible Specific Space

Indivisible space is a function space that cannot be subdivided. It is the basic component that a property offers for function space bookings. Examples are small salons, meeting rooms, and board rooms. Like any other function space, indivisible space occupies a physical area and has capacity characteristics. Depending on the location in the property, indivisible space units can be grouped to form a larger, configured space.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To create indivisible specific space

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, create a new record, complete the appropriate fields, and then save the record.

   NOTE: The Revenue Category and Revenue Parent Category fields are automatically populated based on the selected Revenue Sub Category. To display other Specific Space fields, click the menu button and choose Columns Displayed. For example, the Floor Plan field allows an administrator to select an image of the floor plan with the specific space record.

   The following table describes the fields.

Field	Description
Name	The name of the specific space.
Physical Area	The physical area of the indivisible or configured space.
Backup Required	Indicates whether the specific space requires a backup function space. For more information, see "Marking a Specific Space as Requiring Backup" on page 60.
Type	A product type. This field is automatically set to Indivisible. When you have created a specific space or category, you can drill down on the Type field to define its features from the Product Key Features view.
Description	The description of the specific space.
Display Sequence	The user-defined sequence for the order in which the function space appears in the Function Space Diary.
Compact Sequence	The sequence in which the function space appears in the Function Space Diary's Compact Diary view. For more information about the Compact Diary, see Function Space Diary Views on page 380.
Revenue Category	The revenue category associated with the space. This field is automatically populated when the Subcategory is chosen.
Revenue Sub Category	The revenue subcategory associated with the space.

Field	Description
Revenue Parent Category	The revenue parent category associated with the space.
Usable Area	This value defaults to the Physical area, but it may be changed to be less than the Physical Area if necessary.
Effective Start Date	The date on which this space is available for use.
Effective End Date	The date on which this space is no longer available for use.

NOTE: If specific spaces are not associated with revenue categories, then revenue rollup for the specific spaces does not occur.

To make a specific space effective between certain dates

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, query for the specific space record.
5. Verify that the Effective Start and Effective End fields are displayed.
6. Click the calendar select button, and add dates for both fields to determine the dates between which the specific space is effective.

NOTE: When effective start and end dates are defined for function spaces, these function spaces appear *ineffective* in the Function Space Diary on dates outside the effective period.

Creating Configured Specific Space

Configured space represents groupings of indivisible space components. Examples are ballrooms, banquet rooms, and large salons. The components of a configured space must be physically contiguous, sharing at least one wall.

Before you can create configured space, you must create a number of indivisible spaces as described in Creating Indivisible Specific Space on page 57.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To create configured specific space

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Specific Space view tab.

4 In the Specific Space list, create a new record, and complete the fields.

NOTE: The specific space type remains indivisible (default), until you add components. After you add specific space components, the Type field is automatically updated to Configured.

5 In the Components list, click New, select an indivisible space, and then click OK.

NOTE: You cannot associate a specific space with itself from the dialog box. Also, a specific space can only be added once to a configured space. When you add a specific space, it is no longer available for selection in the Add Components dialog box.

Repeat this step to select additional components to the configured space. You should add at least two components for the space to truly be a configured space.

Creating Function Space Categories for a Property

A *function space category* is a group of specific spaces at a property with common characteristics, usually related to capacity. The groupings can consist of indivisible space and configured space. For example, an administrator can define function space categories such as Small Meeting Room, Medium Meeting Room, and Large Meeting Room with corresponding specific spaces.

Setting up function space categories simplifies room bookings. During the booking process, customers typically do not mind in which room a function is held, as long as a room with sufficient capacity and square footage is guaranteed.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To create a function space category

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for the required property.

3 Click the link in the Property Name field, and then click the Category view tab.

4 In the Category list, create a new record and complete the fields.

The following table describes the fields.

Field	Description
Name	The name of the function space category.
Backup Required	Indicates whether the category requires backup function spaces. For more information, see "Marking a Specific Space as Requiring Backup" on page 60.
Physical Area	The physical area of the category.
Type	Specifies a value of Category or Suite. The default value for the Type field is Category, and it is a read-only field.

Field	Description
Revenue Category	This field is automatically populated when the Revenue Sub Category field is completed.
Revenue Sub Category	The revenue subcategory associated with this function space category.
Revenue Parent Category	This field is automatically populated when the Revenue Sub Category field is completed.
Compact Sequence	The sequence in which the category will appear in the Function Space Diary's Compact Diary view. For more information about the Compact Diary, see Function Space Diary Views on page 380.
Property Unit of Measure	The unit of measure. The read-only field shows the value specified for the property.
Effective Start Date	The date on which this space is available for use.
Effective End Date	The date on which this space is no longer available for use.

NOTE: If function space categories are not associated with revenue categories, then revenue rollup for the function spaces does not occur.

To make a category effective between certain dates

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, query for the category record.
5. Verify that the Effective Start and Effective End fields are displayed.
6. Click the calendar select button, and then add dates for both fields to determine the dates between which the category is effective.

NOTE: When effective start and end dates are defined for categories, these categories appear as *ineffective* in the Function Space Diary on dates outside the effective period.

Marking a Specific Space as Requiring Backup

There are some function spaces that require a backup space in case the function space is unable to be used when required. For example, a wedding party may request to have photographs taken in a garden, or may ask to use a beach attached to the hotel for a beach wedding. However, as these are outdoor events, they may be affected by weather conditions. In this case, it is necessary to indicate that the function space requires a backup space. The backup space that will be used instead of a specific space can be specified when a quote involving the specific space is generated. For more information, see Management of Functions That Require Backup Space on page 302.

To mark a specific space as requiring backup

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, select the required specific space, and then click the check box in the Back Up Required field.

To mark a specific space category as requiring backup

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Categories list, select the required category, and then click the check box in the Back Up Required field.

Associating a Specific Space with Function Space Categories

A specific space can be associated with only one category. As a result, as specific spaces are categorized, the list of uncategorized specific space records gets smaller.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

Related Topics

- Creating Indivisible Specific Space on page 57
- Creating Configured Specific Space on page 58

To associate specific space with a category

1. Navigate to the Property Administration screen > Properties list.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, select the category.
5. Scroll down to the Specific Space view tab and create a new record.

   NOTE: If the category's Backup Required has been selected, then only Specific Spaces whose Backup Required flag has been set will be displayed.

6. Select the specific space record, click OK, and save the record.

Configuring the Do Not Move Flag

When function spaces are being booked, it is possible for users to specify that the function should not be moved afterwards by other users (except administrators). For example, in the Quotes screen > Functions list view, the Do Not Move Flag check box can be selected by users to restrict the movement of the function. See Preventing Functions from Being Moved on page 260 for more information on using the Do Not Move flag.

About the Do Not Move Flag Configuration Values

The TNT SHM Function business component contains a field called Is Do Not Move Read Only. The value for this field can be set to true or false as described in "Configuring the Do Not Move Flag Property" on page 62.

- Is Do Not Move Read Only is set to true (Y).
  - Bookings with the Do Not Move flag are read-only with respect to date, time, duration, and function space.
  - Only an administrator (or the user who originally selected the Do Not Move check box) can clear the check box and change the date, time, duration, and function space.
  - Drag and drop is disabled in the Function Space Diary for bookings with the Do Not Move flag.
- Is Do Not Move Read Only is set to false (N).
  - When users attempt to change the date, time, duration, or function space on a booking with the Do Not Move flag, a confirmation dialog box appears. This dialog box warns that the record is marked as Do Not Move. If the user clicks OK to indicate that he or she still wants to move the booking, the Do Not Move flag is removed and it is moved if the space and time are available.
  - In the Function Space Diary, if the user tries to drag and drop any booking with the Do Not Move flag, a message appears, warning that the booking is marked as Do Not Move. If the user clicks OK to indicate that he or she still wants to move it, the booking is moved if the space and time is available. If the space or time cannot be reserved, the standard dialog box appears, allowing the user to option, overbook, or cancel the move.

Configuring the Do Not Move Flag Property

The administrator can control the effects of users selecting this flag by configuring the appropriate user property in Siebel Tools. To configure the Do Not Move flag, perform the steps in the following procedure.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To change the values for the Do Not Move Flag

1. Log in to Siebel Tools as an administrator.
2. Lock the TNT SHM Function project for editing.
3. In the Object Explorer, navigate to Business Component.

4 Query for TNT SHM Function.

5 Navigate to Business Component > Field.

6 Query for Is Do Not Move Read Only.

7 Change the value for the Calculated Value field to Y.

The default value for this field is N.

8 Compile your changes and replace the Siebel Repository File (.srf).

9 Restart the client.

10 Check that selecting Do Not Move Flag check box results in the behavior described in About the Do Not Move Flag Configuration Values.

Defining Setup Style LOVs

Setup styles must first be defined in the List of Values (LOV) table before the setup styles are associated with a property. For more information about working with LOVs, see *Siebel Applications Administration Guide*.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To define setup style LOVs

1 Navigate to the Administration - Data screen > List of Values list.

2 In the List of Values list, query for records where the Type value equals TNT_SHM_FSI_STYLE.

3 If the desired setup style has not yet been defined, click Clear Cache, create a new record, complete the fields, and save the record.

Make sure to set the Type to TNT_SHM_FSI_STYLE.

Related Topics

- Creating Property-Specific Setup Styles and Associating Packages on page 63
- Associating Setup Styles with Function Space Categories on page 64
- Optimizing Setup Styles for Specific Spaces on page 65

Creating Property-Specific Setup Styles and Associating Packages

An administrator can associate predefined setup styles as well as packages with properties. For more information about creating property-specific menus and packages, see Chapter 7, “Setting Up Property-Specific Menus and Packages.”

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To assign a setup style to a property and associate a package

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Property Style view tab.
4. In the Property Style list, create a new record.
5. Complete all the fields by selecting a setup style, and then entering a display name and a package (if applicable) before saving the record.

   A property-specific or common product can be associated with the setup style. The product, which may be simple or customizable, must have a product type attribute of Setup Style.

Associating Setup Styles with Function Space Categories

An administrator can associate setup styles with function space categories.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To assign a setup style to a function space category

1. Navigate to the Property Administration screen > Properties list.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, select the category, and then scroll down and click the Setup Style view tab.
5. In the Setup Style list, create a new record.
6. Select a value in the Setup Style field.

   You must create a style before you can select a value in this field as described in Creating Property-Specific Setup Styles and Associating Packages on page 63.
7. Complete the remaining fields, specifying the minimum and maximum number of expected attendees for this setup style, and then save the record.

   NOTE: If a setup style has a package associated with it and that style is associated with the function space category, then the package is also associated with the function space category.

Related Topics

- Defining Setup Style LOVs on page 63
- Creating Property-Specific Setup Styles and Associating Packages on page 63
- Optimizing Setup Styles for Specific Spaces on page 65

Optimizing Setup Styles for Specific Spaces

The setup styles associated with function space categories are automatically associated with specific spaces if setup styles do not already exist. The administrator can adjust the information at the specific-space level to address the characteristics of a particular specific space.

This task is a step in Process of Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To fine-tune a setup style for a specific space

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, select a record, and then scroll down and click the Setup Style view tab.
5. Update each setup style record as needed, and save each record.

Related Topics

- Defining Setup Style LOVs on page 63
- Creating Property-Specific Setup Styles and Associating Packages on page 63
- Associating Setup Styles with Function Space Categories on page 64

Creating Sleeping Rooms

An administrator can define sleeping rooms for the property using the Property Administration screen's Sleeping Rooms view. Generic sleeping room types can be mapped to multiple property specific sleeping room types. Multiple property specific sleeping room types can be mapped to multiple generic sleeping room types. Many to many relationships are supported. An administrator can assign a percentage to each mapped property specific sleeping room type to specify how many rooms of each type to reserve.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

To create sleeping room records

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Sleeping Rooms view tab.
4. To create a property-specific sleeping room record, click the Property Specific Sleeping Rooms link.

5 In the Sleeping Rooms list, create a record, and complete the fields.

The following table describes some of the fields.

Field	Comments
Capacity	The room capacity. The number of sleeping rooms of that type in the hotel.
Description	A description of the room.
Name	A descriptive label for the sleeping room. After the record is saved, click the link in the Name field to navigate to the Product Administration screen > Products view.
Product Line	If defined, the product line associated with the sleeping room. Click the link in the Product Line field to navigate to the Product Administration screen > Product Lines view.
Room CRS Code	The Central Reservation System code for the sleeping room.
Type	The sleeping room type. Options are sleeping room and suite.
Effective Start Date	The date on which this sleeping room is available for use.
Effective End Date	The date on which this sleeping room is no longer available for use.

To map a generic sleeping room type to multiple property specific sleeping room types

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for the required property.

3 Click the link in the Property Name field, and then click the Sleeping Rooms view tab.

4 Click the Map Sleeping Rooms link.

5 In the Generic Sleeping Rooms list, select a record, and associate one or more corresponding property specific sleeping rooms in the Sleeping Rooms list.

6 Enter a value in the Percentage to Sell field. This value specifies the percentage of each specific sleeping room type that will be reserved for a single generic sleeping room type.

For example, suppose a generic sleeping room type called Generic Standard is mapped to two property specific types called Standard Smoking and Standard Non Smoking, with Percentage to Sell values of 25% and 75%, respectively. If a customer wants 100 Generic Standard sleeping rooms, the quote will reserve 25 rooms for Standard Smoking and 75 rooms for Standard Non Smoking.

NOTE: The percentage amount of the Percentage to Sell values does not need to be equally distributed among the property specific types, but the distribution amount must equal 100%. If a generic sleeping room is mapped to a single property specific sleeping room type, the Percentage to Sell value must be 100%.

User Scenarios for Mapping Sleeping Rooms

The following scenarios give examples of sleeping room mapping. You may use different mappings, depending on your business model.

Suppose a hotel uses the following mapping:

Generic Room Type	Property Specific Room Type	Distribution %
Generic Standard	King City View	75%
	Double City View	25%
Generic Deluxe	King Ocean View	50%
	Double Ocean View	50%

If a customer requests 50 Generic Standard rooms and 100 Standard Deluxe rooms, the mapping returns the following quote:

Property Specific Room Type	Distribution %	Number of rooms after distribution	Rounding (if applicable)
King City View	75% of 50 rooms	37.5	37
Double City View	25% of 50 rooms	12.5	13
King Ocean View	50% of 100 rooms	50	50
Double Ocean View	50% of 100 rooms	50	50

Suppose a different hotel uses the following mapping:

Generic Room Type	Property Specific Room Type	Distribution %
Generic Standard	King City View	75%
	Double City View	25%
Generic Deluxe	Double City View	25%
	King Ocean View	25%
	Double Ocean View	50%

Notice that the Double City View room type has been mapped to both Generic Room types. If a customer requests 50 Generic Standard rooms and 100 Generic Deluxe rooms, the mapping returns the following quote:

Property Specific Room Type	Distribution %	Number of rooms after distribution	Rounding (if applicable)
King City View	75% of 50 rooms	37.5	37
Double City View	50% of 25 rooms	12.5	13
Double City View	25% of 100 rooms	25	25
King Ocean View	25% of 100 rooms	25	25
Double Ocean View	50% of 100 rooms	50	50

Because the Double City View room type is mapped to both the Generic Standard and Generic Deluxe room types, the distribution totals are combined. The quote displays one count for the combined room type, as shown in the following table:

Property Specific Room Type	Distribution %	Number of rooms after distribution	Rounding (if applicable)
King City View	75% of 50 rooms	37.5	38
Double City View	50% of 25 rooms *and* 25% of 100 rooms	13 + 25	38
King Ocean View	50% of 100 rooms	50	25
Double Ocean View	50% of 100 rooms	50	50

Process of Setting Up Suites

Suites in the hospitality industry are types of sleeping rooms that can be used both as a sleeping room and as a function space. Figure 3 illustrates the suite administration workflow.

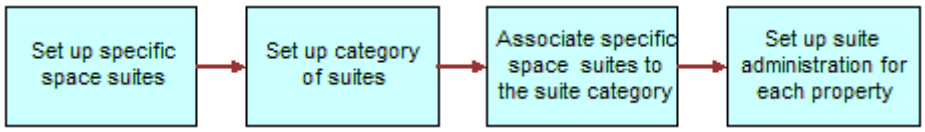


Figure 3. Suite Administration Workflow

This topic lists the tasks typically performed by administrators when setting up suites for a property. Your company may follow a different process according to its business requirements.

To set up suites for a property, perform the following procedures:

1. Setting Up Indivisible and Configured Specific Space Suites on page 69
2. Setting Up the Suite Category and Assigning Suite-Specific Spaces on page 70
3. Associating Setup Styles with Suites on page 70
4. Setting Up Suite Administration on page 70

This process is a subprocess of Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 56.

Setting Up Indivisible and Configured Specific Space Suites

The process of creating specific space suites is similar to the process for setting up specific spaces.

This task is a step in Process of Setting Up Suites on page 68.

To set up an indivisible specific space suite

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field and then click the Specific Space view tab.
4. In the Specific Space list, create a new record, and then complete the suite information such as Name, Physical Area, Usable Area and a description.
5. In the new record, select the Suite check box, and then save the record.

   If the Suite field is not displayed, click the menu button, choose Columns Displayed, and add the Suite field from here.

To set up a configured specific space suite

1. Navigate to the Property Administration screen > Properties list.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, create a new record, and complete the fields.

   NOTE: Make sure the check box is selected in the Suite field.
5. Scroll down to the Components list and click New.
6. From the Add Component dialog box, select an indivisible specific suite space, and click OK.
7. Save the records.
8. Repeat Step 4 and Step 5 to select additional components.

Setting Up the Suite Category and Assigning Suite-Specific Spaces

An administrator can set up a category to group indivisible or configured specific space suites. After creating the category, the administrator can assign suite-specific spaces to the category.

This task is a step in Process of Setting Up Suites on page 68.

To set up a category for suites

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, create a new category, and set the value in the Type field to Suite.
5. Complete the remaining fields, and save the record.

To associate suites with a category

1. Navigate to the Property Administration screen > Properties list.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, select the suites category, and then scroll down to the Specific Space view tab.
5. In the Specific Space list, create a new record, select a suite-specific space, and then save the record.

Associating Setup Styles with Suites

Assigning setup styles to suites is performed in the same way as assigning setup styles to other function space records. For more information, see Associating Setup Styles with Function Space Categories on page 64.

This task is a step in Process of Setting Up Suites on page 68.

Setting Up Suite Administration

Using the Suite Administration view, an administrator can specify information such as check-in and check-out times. Check-in and check-out information is used when booking suites as sleeping rooms.

This task is a step in Process of Setting Up Suites on page 68.

To set up suite administration

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field, and then click the Suite Administration view tab.
4. Complete the fields in the form.

   The following table describes some of the fields.

Field	Description
Check in Time	The time when the guests can usually check in to the hotel when the suite is used as a sleeping room.
Check out Time	The time when the guests have to check out of the hotel after sleeping in a suite.
Suite Room Rental	If you select this check box, the function space rental is counted as Sleeping Room revenue. If it is not selected, then the function space rental is counted under Function Space revenue.

6 Setting Up Products and Assets

This chapter describes the process of setting up products and assets in Siebel Hospitality. It includes the following topics:

- Product Administration in Hospitality on page 74
- Process of Setting Up Products and Assets on page 74
- Creating Hospitality Revenue Categories and Revenue Subcategories on page 75
- Simple and Complex Products in Hospitality on page 77
- Creating Simple Products for Hospitality Events on page 78
- Creating Complex Products for Hospitality Events on page 79
- Adding Catalog Visibility to Products on page 82
- Forecasting Product Consumption on page 85
- Creating Generic Catering Products on page 86
- Creating Generic Room Blocks on page 87
- Creating Property-Specific Products on page 87
- Mapping a Generic Catering Product to a Property-Specific Product on page 88
- Mapping Generic Room Blocks to Property-Specific Room Types on page 89
- Creating Hospitality Assets on page 89
- Managing Function Spaces, Sleeping Rooms, and Categories as Products on page 91

Use this chapter in combination with *Siebel Applications Administration Guide*, *Siebel Product Administration Guide*, and *Siebel Pricing Administration Guide*.

Product Administration in Hospitality

Using the Product Administration screen, administrators can define hospitality product details for use by event managers. Administrators can set up two types of products as follows:

- **Complex products.** Complex products are products that may be broken up into subproducts. For example, menus and packages are set up as complex products. Equipment bundles are also set up as complex products. You can enter an audiovisual projector as the product and include subproducts such as extension cord, lens cap, and so on.
- **Simple products.** Simple products are products that cannot be further broken up into smaller subproducts—for example, individual menu items such as seafood chowder or grilled scallop.

Additionally, using the Property Administration screen, administrators can follow a simplified process to create menus and packages that are automatically associated with specific properties. For more information about defining property-specific menus and packages, see Chapter 7, "Setting Up Property-Specific Menus and Packages."

Product detail definition includes revenue types for reporting purposes and charge codes for tax, charge, and fee calculations.

Related Topic

Process of Setting Up Products and Assets on page 74

Process of Setting Up Products and Assets

This topic lists the tasks typically performed by administrators when setting up products and assets. Your company may follow a different process according to its business requirements.

To set up products and assets, perform the following procedures:

1 Creating Hospitality Revenue Categories and Revenue Subcategories on page 75

2 Creating Simple Products for Hospitality Events on page 78

3 Creating Complex Products for Hospitality Events on page 79

4 Adding Catalog Visibility to Products on page 82

5 Forecasting Product Consumption on page 85

6 Creating Generic Catering Products on page 86

7 Creating Generic Room Blocks on page 87

8 Creating Property-Specific Products on page 87

9 Mapping a Generic Catering Product to a Property-Specific Product on page 88

10 Mapping Generic Room Blocks to Property-Specific Room Types on page 89

11 Creating Hospitality Assets on page 89

12 Managing Function Spaces, Sleeping Rooms, and Categories as Products on page 91

Creating Hospitality Revenue Categories and Revenue Subcategories

In Siebel Hospitality, a product is an item, group of items, service, or group of services that your organization provides during an event. Items may include tables, chairs, and so on. A service may be a task performed by an audiovisual technician.

Products are grouped into revenue parent categories, revenue categories, and revenue subcategories to organize and administer them and for revenue rollup purposes. Using Siebel Hospitality, the administrator can create new revenue categories or add revenue subcategories to existing revenue categories. The administrator creates revenue categories through the Revenue Category Administration view. All function space revenues are associated with revenue parent categories for revenue rollup purposes.

Siebel Hospitality includes a number of predefined revenue categories that can be used as revenue parent categories when defining categories. Examples of predefined revenue categories are A/V, Banquet, Beverage, Billing, Food, Rental, Sleeping Room, Special, and so on. The Special category allows grouping of unique items for an event, such as fountains, paintings, signboards, and billboards.

Figure 4 shows the relationship between a revenue category, a revenue subcategory, a product, and an asset. For each revenue category, there can be multiple revenue subcategories. For each revenue subcategory, there can be multiple products. For each product, there can be multiple assets.

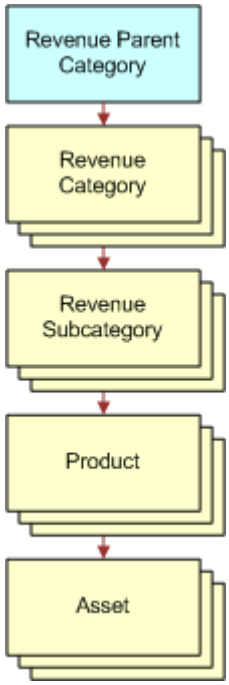


Figure 4. Relationship Between a Category, a Subcategory, a Product, and an Asset

NOTE: Revenue Category Administration within Siebel Hospitality is different from Category Administration within the standard Siebel Business Applications. In Siebel Hospitality, products are categorized for revenue purposes, whereas, in the standard Siebel Business Application, the categorization is for similar products, and does not have a bearing on revenue. For more information about standard product categories, see *Siebel Product Administration Guide*.

This task is a step in Process of Setting Up Products and Assets on page 74.

To create a revenue parent category

1. Navigate to the Revenue Category Administration screen > Category Admin List.
2. In the Category Admin List, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
BRS Report Flag	If this flag is checked, the revenue parent category and its related revenue will be displayed in the Banquet Revenue Summary report.
Description	A description of the revenue parent category.
Name	The name of the revenue parent category.
Print Line Items in SOE	When the Print Line Items in SOE check box is selected, items in the revenue parent category are included in the Schedule of Events (SOE) report. For more information, see About the Schedule of Events (SOE) Report on page 476
Sequence	The sequence in which the revenue parent category will show up in the list of categories.

   For more information on field values, see *Siebel Applications Administration Guide*.

   Repeat Step 2 for each revenue parent category record.

To create a revenue category

1. Navigate to the Revenue Category Administration screen > Category Admin List.
2. In the Revenue Parent Category list, query for the revenue parent category for which you want to create a revenue category.
3. Drill down on the Name hyperlink.
4. In the Revenue Categories list, create a new record and complete the fields.

To create a revenue subcategory

1. Navigate to the Revenue Category Administration screen > Category Admin List.
2. In the Revenue Parent Category list, query for the revenue parent category for which you want to create a revenue subcategory.

3 Drill down on the Name hyperlink.

4 In the Revenue Categories list, select the revenue category for which you want to create a revenue subcategory.

5 Scroll down to the Sub Revenue Categories list, create a new record in the list, and complete the fields.

To create notes for categories

1 Navigate to the Revenue Category Administration screen > Category Admin List.

2 In the Revenue Parent Category list, query for the required parent category.

3 Drill down on the Name hyperlink.

4 In the Revenue Categories list, select the required category.

5 Scroll down to the Sub Revenue Categories list, and then click the Notes view tab.

6 Create a new record, designate a note type by selecting a value for Type, and then complete the Note field.

The following fields are automatically populated:

- Sequence
- Created
- Created By

NOTE: Notes are displayed under the revenue category name in the Banquet Event Orders (BEO) report and the Schedule of Events (SOE) report. The sequence number determines the order in which the notes get printed for the BEO and the SOE reports. For more information on creating reports, see *Siebel Reports Administration Guide*.

Simple and Complex Products in Hospitality

In Siebel Hospitality, a *simple product* is a single component product, such as table, chair, beverage, and so on. A *complex product* is a group of simple products, such as menu, package, and so on. For example, a beverage is a simple product that can be part of a complex product such as a menu. For more information about products, see *Siebel Product Administration Guide*.

The administrator uses the Product Administration screen to create simple and complex products for Siebel Hospitality.

NOTE: Additionally, using the Property Administration screen, administrators can follow a simplified process to create menus and packages that are automatically associated with specific properties. For more information about defining property-specific menus and packages, see Chapter 7, “Setting Up Property-Specific Menus and Packages.”

When defining simple and complex products, perform the procedures in the following order:

1 Creating Simple Products for Hospitality Events on page 78

2 Creating Complex Products for Hospitality Events on page 79

This task is a step in Process of Setting Up Products and Assets on page 74.

Creating Simple Products for Hospitality Events

Use the Product Administration screen to create the simple products that can be grouped to create complex products.

This task is a step in Process of Setting Up Products and Assets on page 74.

To create a simple product in Hospitality

1 Navigate to the Administration - Product screen > Products list.

2 In the Products list, click New and Release to create a new product record and complete the fields.

The following table describes some of the fields.

Field	Comments
Name	The product name.
Part #	The part number for the product.
Type	The type of product. Examples are Menu, Package, Sleeping Room, and Setup Style.
Organization	Automatically populated with the name of the default organization. The user can change the selection, and add more than one organization, specifying one as the primary.
Unit of Measure	The unit of measure used for the product. For example, if coffee is the product, the unit of measure might be pounds.
Revenue Subcategory	The revenue subcategory for the product.
Revenue Category	This field is automatically populated after a revenue subcategory is specified.
Parent Revenue Category	This field is automatically populated after a revenue subcategory is specified.
Resource Type	Determines whether or not the item is automatically reserved for an event. Available values are Critical, General, and Non-Critical and are drawn from the LOV. For more information about these values, see About Hospitality Assets on page 330.
Set-Up Time	Minutes needed to set up a product.
Tear-Down Time	Minutes needed to tear down a product.

Field	Comments
Property	Select the property at which this product is available.
Billable Flag	If you want the customer to be charged for use of the product, then select this flag. For example, you may want to charge customers for bottles of champagne, or you may not want to charge customers for the use of table and chairs at a function.
Grouping	Allows you to group products to make it easy for you to search for products of a certain grouping. For example, you may want to find all dinner main courses on available at a particular property.
Report Header	Select a report header for the product.

Related Topics

See *Siebel Product Administration Guide*.

Creating Complex Products for Hospitality Events

To create a complex product, the administrator must first define the simple products, and then add the components to the complex product.

Use the Product Definitions view in the Product Administration screen to create and validate complex products. Creating a complex product is a two-step process; complete the following procedures in order:

1. Preparing a Simple Product Base for a Complex Product on page 79
2. Creating a Complex Product for Hospitality Events on page 80

This task is a step in Process of Setting Up Products and Assets on page 74.

Preparing a Simple Product Base for a Complex Product

This procedure prepares you for complex product creation, and assumes the simple products that make up the complex product are already defined. For more information, see Creating Simple Products for Hospitality Events on page 78.

This task is a step in Creating Complex Products for Hospitality Events on page 79.

To prepare a simple product base for a complex product in Hospitality

1. Navigate to the Administration - Product screen > Product Definitions list.
2. In the Products list, query for the required product.

3 Click the check box in the Locked Flag field to lock the product.

The product is now locked so that others cannot edit it.

The next step is Creating a Complex Product for Hospitality Events.

Creating a Complex Product for Hospitality Events

This procedure describes how to finish the complex product creation after you have completed the task, Preparing a Simple Product Base for a Complex Product on page 79.

This task is a step in Creating Complex Products for Hospitality Events on page 79.

To create a complex product in Hospitality

1 Navigate to the Administration - Product screen > Product Definitions list.

2 Select a product and in the Versions applet, drill down on the Version field.

3 Select the Structure view tab.

4 In the Structure list, create a new product and complete the fields.

The following table describes some of the fields.

Field	Comments
Relationship Name	This field is automatically populated when the Product Class field or Product field has been populated.
Domain Type	The domain type dictates whether the class or product field needs to be populated. There are three options as follows: ■ **Product.** This relationship contains a single product. Select this type when the product is mandatory or you want to display this item on a separate page in the user interface. ■ **Class.** This type does not update customizable product relationships when you refresh the workspace. Select this type when you want relationship definitions to remain static or when you want to add some but not all of the products in a class. ■ **Dynamic Class.** This type updates customizable product relationships when you refresh the workspace. Select this type when it is important that the customizable product contains the most current form of a product class.
Product Class	A previously defined product class. This field is only editable if the domain type is Class or Dynamic Class. For more information about Product Classes, see *Siebel Product Administration Guide*.
Product	A previously defined simple or complex product. This field is only editable if the domain type is Product.

Field	Comments
Default Product	To make a product the default product, do the following: ■ Set the Type to Class. ■ Click the Define Domain Button. ■ Select a product from the Define Relationship Domain picklist, and click Set as Default.
Default Cardinality	Specifies what quantity of the simple product automatically appears when the complex product is chosen by a user. Default cardinality must be equal to or greater than the minimum cardinality and must be less than or equal to the maximum cardinality.
Maximum Cardinality	Sets the maximum number of items the user can select from a product. If you set the minimum cardinality to greater than 0, you must set the maximum cardinality to a number at least as large.
Minimum Cardinality	Governs whether or not selecting items from this product is optional or required. If you set the minimum cardinality to 0, selecting items is optional. If you set the minimum cardinality to greater than 0, the user must select at least that number of items.
Sequence #	The sequence in which the simple products are shown in a list.

A user can change the quantities associated with a child product in Functions > Line Items. If the minimum cardinality of a child product is set to 0 in Product Administration, then the user can, for that instance only, remove that product from the complex product by setting the quantity to 0. For more information about cardinality, see *Siebel Product Administration Guide*.

Repeat this procedure for each simple product included in the complex product.

Validating Product Versions

Validation provides a way to verify that each child product cardinality is set correctly before making it available to others.

To review and validate product versions

1. Navigate to the Administration - Product screen > Product Definitions list.
2. In the Products list, query for the required product.
3. In the Versions applet, validate that cardinality for each product is entered correctly.
   - a. Click the Validate button.
   - b. Review product information.
   - c. If changes are required, drill down on the Version field.
   - d. Click the Structure tab and make the necessary changes.
   - e. Repeat the validation process until the information is correct.

f If no changes are required, click Done.

4 In the Versions form, click Release New Version.

The product is now unlocked, which means that others can use the product and edit the product fields.

For general information on working with products, see *Siebel Product Administration Guide*.

Adding Catalog Visibility to Products

When simple and complex products have been created, administrators must add catalog visibility to these products. Catalogs are different from Revenue Categories in that they allow you to group similar products together. These groups of products may then be assigned to groups of people to control which users may access the products. By adding catalog visibility to products, you allow them to be accessed by different groups of people in your company.

You may further subdivide catalogs into product categories. For example, when you are creating a menu catalog, you might want to create different categories for starters and main courses.

When creating catalogs, you can also provide effective start and end dates for the categories associated with the catalog. This is important when you are offering seasonal products at functions. For example, you may have different menu options in winter than those available during the summer.

To give a product catalog visibility, you must do the following:

- Creating the Product Catalog on page 82
- Creating a Product Category on page 83
- Adding Products to Catalogs and Categories on page 83
- Adding Access Groups to Catalogs and Categories on page 84

For more information about access groups and visibility, see *Siebel Applications Administration Guide*.

This task is a step in Process of Setting Up Products and Assets on page 74.

Creating the Product Catalog

The following procedure details how to create a product catalog.

This task is a step in Adding Catalog Visibility to Products on page 82.

To create a product catalog

1 Navigate to the Administration - Catalog screen > Catalog Administration list.

2 In the Catalog Administration list, create a new record and complete the fields.

Some of the fields are described in the following table.

Field	Comments
Name	The name of the new catalog.
Description	A description of the catalog.
Effective Start Date, Effective End Date	The date range between which the catalog is effective.
Private	Select this check box if you want the catalog to be visible only to users belonging to the access groups associated with it. If the catalog is private, all of its categories will also be private.
Active	Select this check box if the category is active.
Sequence	The sequence of this catalog in the list.

Creating a Product Category

You can further group products into product categories under catalogs.

This task is a step in Adding Catalog Visibility to Products on page 82.

To create a product category

1 Navigate to the Administration - Catalog screen > Catalog Administration list.

2 In the Catalog Administration list, query for and select the required catalog.

3 Drill down on the Name hyperlink.

The Categories view appears.

4 Create a new category, complete the fields, and save the record. For information about the fields, see Creating the Product Catalog on page 82.

5 Make sure that you complete the Effective Start Date and Effective End Date fields for the category. This is important as these dates are checked when you create a quote line item for effective catalogs.

6 Create new product categories as required.

7 Indent the new category under the original catalog to create a category hierarchy.

Adding Products to Catalogs and Categories

After you have created product catalogs and categories, you may add products to them.

This task is a step in Adding Catalog Visibility to Products on page 82.

To add products to catalogs and categories

1. Navigate to the Administration - Catalog screen > Catalog Administration list.
2. In the Catalog Administration list, query for and select the required catalog.
3. Drill down on the Name hyperlink, and select the required catalog or category in the Categories list.
4. Scroll down, click the Categories view tab, and then click the Products list.
5. In the Products list, create a new record.
6. The Add Internal Products selection dialog box is displayed.
7. Query for and select the required product, and click OK.

   Most of the fields are populated when the product has been selected.
8. If necessary, enter the sequence in which the products added are to be displayed.

Adding Access Groups to Catalogs and Categories

When you have added products to catalogs and categories, you may add access groups to make the products visible to the required groups of people.

This task is a step in Adding Catalog Visibility to Products on page 82.

To add access groups to a catalog

1. Navigate to the Administration - Catalog screen > Catalog Administration list.
2. In the Catalog Administration list, query for and select the required catalog.
3. Drill down on the Name hyperlink, and then click the Access Groups view tab.
4. In the Access Groups list, create a new record.
5. The Add Access Groups selection dialog box is displayed.
6. Query for and select the required access group, and click OK.

   The remaining fields are populated when the required access group is chosen.

To add access groups to a category

1. Navigate to the Administration - Catalog screen > Catalog Administration list.
2. In the Catalog Administration list, query for and select the required catalog.
3. Drill down on the Name hyperlink, and select the required category in the Categories list.
4. Click the Categories view tab, and then click the Access Groups link.
5. In the Access Groups list, create a new record.
6. The Add Access Groups selection dialog box is displayed.

7 Query for and select the required access group, and click OK.

The remaining fields are populated when the required access group is chosen.

For more information about access groups, see *Siebel Applications Administration Guide*.

Forecasting Product Consumption

The quantity of most products to be used at an event is normally entered in the product's line item quantity field. However, for some products, the quantity of the product used, which is used to forecast revenue, is calculated based on the number of attendees.

For example, if a guest asks for coffee provided at a function for a specified number of guests, the hotel administrator would know from experience that approximately two out of five people drink coffee at such an event. In this manner, the hotel administrator may forecast the consumption for the product. This can help when forecasting the amount of revenue expected from this product according to the number of guests that use the product.

NOTE: If a quantity is entered for a line item, then the line item value is used to calculate revenue rather than product consumption forecasting.

This task is a step in Process of Setting Up Products and Assets on page 74.

To forecast the consumption of a product

1 Navigate to the Administration - Product screen > Products list.

2 In the Products list, click New and Release to create a new product record.

In the new record, complete the fields in the following table.

Field	Comments
Forecast Qty	Select this flag to allow product consumption forecasting. If this field is not selected, then the line item quantity is used to forecast the revenue for the item instead of product consumption forecasting.
UoM	The unit of measure by which the product is sold.
Consumption UoM	Indicates the unit of measure for actual consumption by the attendee. For example, coffee may be for sale by the gallon to a function but the attendee will consume cups of coffee.
UoM Conversion Factor	The ratio of Consumption UoM to Product UoM. For example, if there were 20 cups of coffee in 1 gallon of coffee, then the ratio is 20:1, and the conversion factor is 20.

Field	Comments
Consumption Factor	Defines the expected Consumption UoM of the product. For example, if each attendee was to consume 2 cups of coffee, then the Consumption Factor is 2.
% Participation	The percentage of the attendees that are expected to consume the product. Express this as a fraction of 1. For example, if 80% are to consume the product, then enter 0.8 to this field.

3 Complete the remaining fields and save the record.

NOTE: In some cases, the percentage participation may be different from property to property. For example, in colder states, people may be more likely to drink hot coffee than in warmer states. In this instance, it is necessary to create different products with different values in the % Participation field.

Example of How Product Consumption Forecasting Works

The following example will attempt to illustrate how consumption forecasting works. Assume that the following values are entered for the coffee:

- Expected number of attendees = 100
- Coffee Price = $10 per gallon
- 20 cups = 1 Gallon (UoM Conversion factor = 20)
- Consumption Factor = 2 cups of coffee per person
- Percentage Participation = 80%

The calculation would be as follows:

```
Number of attendees to consume product equals 100 X 0.8 = 80

Number of cups consumed equals 80 X 2 = 160

Number of gallons used equals 160 / 20 = 8

Forecasted Revenue = 8 X 10 = $80
```

Creating Generic Catering Products

Use the Product Administration screen to create generic catering products.

This task is a step in Process of Setting Up Products and Assets on page 74.

To create a generic catering product

1 Navigate to the Administration - Product screen > Products list.

2 In the Products list, click New and Release to create a new record.

3 In the new record, select Generic in the Type field.

4 Complete the remaining fields and save the record.

Creating Generic Room Blocks

Use the Product Administration screen to create generic room blocks.

This task is a step in Process of Setting Up Products and Assets on page 74.

To create a generic room block

1 Navigate to the Administration - Product screen > Products list.

2 In the Products list, click New and Release to create a new product record.

3 In the new record, select Generic Room Block in the Type field.

4 Complete the remaining fields and save the record.

NOTE: The Generic Room Block option can be chosen in the opportunity Room Block Line Item view.

Creating Property-Specific Products

Use the Product Administration screen to create property-specific products.

This task is a step in Process of Setting Up Products and Assets on page 74.

To create a property-specific product

1 Navigate to the Administration - Product screen > Products list.

2 In the Products list, click New and Release to create a new product record.

3 Complete the appropriate fields and save the record.

The following table describes some of the fields.

Field	Description
Name	The product name.
Part #	The part number for the product.
Type	The type of product. Examples are Menu, Package, Sleeping Room, and Setup Style.
Organization	Automatically populated with the name of the default organization. The user can change the selection or add more than one organization, designating one organization as the primary.

Field	Description
UoM	The unit of measure used for the product. For example, if coffee is the product, the unit of measure might be pounds.
Revenue Subcategory	The revenue subcategory for the product.
Revenue Category	This field is automatically populated after a revenue subcategory is specified.
Revenue Parent Category	This field is automatically populated after a revenue subcategory is specified.
Resource Type	Designates whether the product is Critical, Non Critical, or General. For more information about these values, see About Hospitality Assets on page 330.
Property	The property associated with the product.

Mapping a Generic Catering Product to a Property-Specific Product

After a generic product is created, the administrator must map the property-specific product to the generic product. This facilitates the conversion of generic products during the create quote process.

NOTE: Generic catering products can also be chosen in the opportunity's Function Line Items view after the opportunity has been created.

This task is a step in Process of Setting Up Products and Assets on page 74.

To map a generic catering product to a property-specific product

1. Navigate to the Administration - Product screen > Products list.
2. In the Products list, query for the required generic catering product.
3. Drill down on the Name hyperlink.
4. Click the Specific Products view tab.
5. In the Specific Products list, create a new record and select the appropriate property-specific product.
6. Save the record.

Mapping Generic Room Blocks to Property-Specific Room Types

After generic room blocks are created, the administrator must map the property-specific room types to the generic room block types. This facilitates the conversion of generic room block items during the create quote process. This process assumes that the administrator has already created the appropriate room types for the property. For more information, see Creating Sleeping Rooms on page 65.

NOTE: The procedure described in Creating Sleeping Rooms on page 65 also details how to map a generic room block to property-specific room block types. If you do not map the sleeping room to a room block type at that stage, you may do it using the following procedure.

This task is a step in Process of Setting Up Products and Assets on page 74.

To map a generic room block to a property-specific room type

1. Navigate to Administration - Product screen > Products list.
2. In the Products list, query for the required generic room block product.
3. Drill down on the Name hyperlink.
4. Click the Specific Products view tab.
5. In the Specific Products list, click New.
6. In the Add Specific Product dialog box, select the appropriate property-specific room type, and then click OK.
7. Save the record.

Creating Hospitality Assets

An asset is a specific physical instance of a product. End users reserve assets, not products. An asset can be associated with a specific property, and multiple assets can be associated with a single product. For example, a product called Piano can have the following assets:

- Yamaha Piano at New York property, Serial # 7896-0987
- Wurlitzer Piano at London property, Serial # Z765-9876

NOTE: An asset cannot be created unless a product for that asset has already been defined.

Additionally, administrators can create assets for menu items and event order items that are automatically associated with specific properties and that form components of property-specific menus and packages. For more information about defining property-specific assets, see "Creating Assets for Property-Specific Products" on page 103.

Optionally, preventive maintenance can be applied to an asset. For information about setting up and using preventive maintenance for an asset, see *Siebel Field Service Guide*.

This task is a step in Process of Setting Up Products and Assets on page 74.

To create an asset

1. Navigate to the Assets screen > Assets List view.
2. In the Assets list, create a new record, complete the fields, and save the record.
3. In the new record, click the Asset # hyperlink.

   The Assets Components view is displayed.
4. Click the More Info tab and complete the fields.

   The following table describes some of the fields.

Field	Comments
Account	The account associated with this asset.
Asset #	A unique number used to track the asset.
Asset Tag	Identifier from the physical label on an asset.
Installed	Defaults to the date the asset is entered.
Original Cost	The original cost of the asset.
Owner	The account to which the asset is assigned.
Ownership	The kind of ownership; choices are Rented, Leased, Purchased, Financed, and Consigned.
Part #	The part number for the asset. This field is automatically populated when a product is selected if the product had a value in this field when it was created.
Product	The product with which the asset is associated. **NOTE:** If the product is a property-specific product, then the same property should be selected for this asset.
Property	The property at which the asset is located.
Serialized	Indicates whether or not the product is a serialized product. This field is read-only in the Assets screen.
Serial #	The serial number of the asset.
Status	Select a status of either Active or Available to make the asset available for use. This will allow the asset to be chosen for use at a property.
Qty	Quantity specified for the asset. Defaults to 1.

Defining Asset Inventory Display in the Function Space Diary

After you create asset records, you can define the method of display for the assets in the Function Space Diary using the Function Space Administration screen. For more information, see Defining Function Space and Asset Inventory Status Indicators on page 129.

Managing Function Spaces, Sleeping Rooms, and Categories as Products

Function spaces, sleeping rooms, and categories are created using the Property Administration screen. However, after they have been created, they are also displayed in the Product Administration screen. As soon as a new record is defined in any of the appropriate Property Administration views, a new product record is also created and released. For more information on creating these products, see Setting Up Function Spaces, Sleeping Rooms, and Suites on page 55.

This task is a step in Process of Setting Up Products and Assets on page 74.

This topic includes the following related topics:

- Navigating to the Product Administration Screen from the Property Administration Screen on page 91
- Adding Product Attributes to Function Spaces, Categories, and Sleeping Rooms on page 92
- Creating Function Space Product Features for the Opportunity Screen's Function Agenda on page 93

Navigating to the Product Administration Screen from the Property Administration Screen

You can navigate to the Product Administration screen from a number of the Property Administration screen's views. These include:

- Property Administration screen > Specific Space view
- Property Administration screen > Category view

This task is a step in Managing Function Spaces, Sleeping Rooms, and Categories as Products on page 91.

To navigate to the Product Administration screen from the Specific Space view

1. Navigate to the Property Administration screen.
2. Drill down on a property record.
3. Click the Specific Space view tab.
4. Drill down on the value entered in the Type column.

   You are brought to the Product Administration screen > Products > More Info view.

To navigate to the Product Administration screen from the Category view

1. Navigate to the Property Administration screen.
2. Drill down on a property record.
3. Click the Category view tab.

4 Drill down on the value entered in the Type column.

You are brought to the Product Administration screen > Products > More Info view.

Adding Product Attributes to Function Spaces, Categories, and Sleeping Rooms

Attributes can be used with Hospitality products to handle price adjustments. For example, it may be appropriate to charge cheaper rates for sleeping rooms that have a street view rather than an ocean view.

Attributes must be defined, added to a class, released for version control, and then added to the appropriate products.

This task is a step in Managing Function Spaces, Sleeping Rooms, and Categories as Products on page 91.

To define product attributes

1 Navigate to the Administration - Product screen > Attribute Definitions list.

2 Create a new attribute record and select the Locked Flag check box.

3 In the Versions applet, drill down on the Version field.

4 Choose an option from the Domain Type drop-down list.

Select Free Form if you want to allow users to enter their own values for the attribute. Select Enumerated if you want to define a list of values from which the users must choose when using the attribute.

To define a list of values for the attribute:

a In the Attributes Values list, click the New button.

b In the Value field, add the name for the value. For example, the view attribute could have Street View, Ocean View, or Gardens View as possible values.

c In the Sequence field, enter the order in which the value should appear in the list. For example, enter 1 to display the value at the top of the list.

5 Go back to the Attribute Definitions list, query for the new record and click the Release button.

6 Click the Product Classes tab to navigate to that view.

7 Create a new class record and select the Locked Flag check box.

8 In the Versions applet, drill down on the Version field.

9 Add the new attribute to the class.

If you have defined a list of values for the attribute, you will see that the values you entered appear in the Default Value drop-down list and in the sequence that you specified.

10 Go back to the Product Classes list, query for the new record and click the Release button again.

You can now add the class and its related attributes to a product.

To add an attribute to a product

1 Navigate to the Administration - Product screen > Product Definitions list.

2 Query for a product to which you want to add the attribute.

3 Select the Locked Flag check box.

4 In the Product Class field, click the select button and choose the product class to which the attribute belongs.

5 Click the Release button.

The product is now associated with the product class and inherits all the class attributes.

Creating Function Space Product Features for the Opportunity Screen's Function Agenda

Administrators can define features for function space product lines so that they can be specified when entering an opportunity's function agenda. The features specified for the function agenda are then used to select the most appropriate function space during the create quote best fit process.

For example, several function spaces at a property have exactly the same Room Area, Setup Style, and Expected Attendees values. However, only one of the function spaces (Salon A) has a south-facing view. If South View is specified as a feature in the opportunity's function agenda, the create quote best fit process will only return Salon A as the function space for the booking.

When the create quote best fit process is launched, it first examines categories to check whether the specified feature has been associated with a category. If the feature has not been associated with a category, the process then checks specific spaces.

After creating a product feature, you must associate it with the appropriate categories or specific spaces so that the create quote best fit process will know which space to match to the booking. To accomplish this, perform the steps in the following procedures.

This task is a step in Managing Function Spaces, Sleeping Rooms, and Categories as Products on page 91.

To create a product feature

1 Navigate to the Administration - Product screen > Product Features list.

2 In the Product Features list, add a new record.

3 In the Product Line field, click the select button and add Function Space as the value.

4 Step off the record to save your information.

5 Navigate to the Opportunities screen > Function Agenda view.

6 In the Function Agenda list's Feature field, the Function Space features you added should now be displayed as options in the drop-down list.

To associate a product feature with a specific space or category

1 Navigate to the Administration - Product screen > Products list.

2 In the Products list, query for a specific space or category.

3 Drill down on the Name field value to navigate to the Product Key Features list.

4 In the Product Key Features list, create a new record.

5 Select a product feature from the Feature drop-down list.

NOTE: When defining the key features for the function space, you must choose features with a Function Space product line if the space is to match function agenda feature requirements.

6 Step off the record to save your information.

The product feature is now associated with the specific space or category.

7 Setting Up Property-Specific Menus and Packages

This chapter describes how to set up property-specific menus and packages. It includes the following topics:

- "About Menus and Packages Administration" on page 95
- "Process of Setting Up Menus and Packages" on page 99
- "Associating a Default Catalog Category With a Property" on page 100
- "Creating Property-Specific Products" on page 100
- "Creating Property-Specific Menus" on page 104
- "Creating Property-Specific Packages" on page 107
- "Sharing Property-Specific Products With Other Properties" on page 111
- "Ongoing Tasks for Setting Up Menus and Packages" on page 111
- "Revenue Allocations for Menus and Packages" on page 114

About Menus and Packages Administration

You can set up simple and complex products that are available throughout the system. Chapter 6, "Setting Up Products and Assets" describes this process. However, in Siebel Hospitality, you can also set up products that are specific to selected properties. This chapter describes how to set up menus and packages as property-specific products. By default, a menu or package created in this way is associated with one specific property.

In addition to creating menus and packages that are automatically associated with the property of your choice, the functionality described in this chapter is a simplified way of creating menus and packages as complex products. To create a menu or package with the functionality described in this chapter, you first create the component simple product items. Then you create a menu or package record and assign items to it. Then you assign prices to the menu or package.

Menus and Packages Defined

A *menu* is a grouping of Food and Beverage (F&B) items that may be sold together but will have an individual price attached to each item. A menu can include *only* F&B items. A menu can be a fixed-price menu that costs the same regardless of items selected, or a variable-price menu that depends on the items selected. A variable-price menu can include alternate choices with different prices; for example, a salmon entree for U.S. $24.95 or a prime rib entree for U.S. $29.95. In this case, the price for each person will vary depending on the individual selections.

A *package* is a grouping of items that may include menus, individual F&B items, individual non-F&B items, BEO (Banquet Event Order) items, and other packages. A package can have one overall price or a separate price for each person.

Both menus and packages are complex products. A menu is composed of multiple simple products, while a package is composed of multiple simple products and, possibly, other complex products as well. For more information about simple products and complex products, see "Simple and Complex Products in Hospitality" on page 77.

Menus and Packages Revenue Breakouts

Siebel Hospitality has views that break down revenue information in detail for accounting purposes and other views that sum up revenue information for presentation to your customers. Siebel Hospitality performs financial breakout calculations (including revenues, taxes, service charges, AV rentals, sleeping room rentals, banquet room rentals, and so on) in the background, and transmits these calculations to the various revenue buckets and tracking categories.

Guests do not see accounting line items details on their bills. However, if needed, you can supply guests with this information. You can also track items into revenue categories and sub-categories. For example, Liquor, Beer, and Wine sub-categories are tracked to the Beverage category.

For more information about, and examples of, revenue breakouts for menus and packages, see "Revenue Allocations for Menus and Packages" on page 114.

Types of Menus and Packages

Several types of menus and packages define how they are priced.

- **Menu Per Person.** This menu type provides for one menu for each person. This type can be a *set menu*, which is a menu with a fixed price for each person, or a *split menu*, which is a menu with a variable price for each person depending on the items selected.
- **Package Per Person.** This package type provides a fixed price for each person where individual item prices are not broken out.
- **Package Each.** This package type provides a fixed price for a quantity of 1 of the package, regardless of the number of people.
- **Package Item Price.** This package type provides a variable price for each person where individual item prices are broken out.

Each menu and package type has its own pricing rules. In the case of a Package Per Person, Package Each, and Menu Per Person that is a set menu, there is a set price for the parent product. That price is what a customer pays regardless of the child products.

In the case of Package Item Price, however, the parent package does not have a set price. Pricing is based on the items in the package and how many of the items the customer orders. For example, consider a cash bar, which may include various beverages. The cash bar's price is based on how many of each of the child products is ordered. Likewise, for a Menu Per Person that is a split menu, the parent menu's price varies by the items ordered. For example, a split menu may offer a choice of steak or chicken. Depending on choice, this menu will have two different prices.

Examples of Menu Types

This topic shows examples of different types of menus.

- **Menu per person, simple set menu.** A simple dinner menu might include the items listed in Table 6. This menu has a per-person price of U.S. $21.95.

Table 6. Dinner Menu Example

Quantity	Item
1	Salad
1	Dinner entree
1	Vegetable
1	Dessert

- **Menu per person, complex set menu.** A complex dinner buffet menu might include the items listed in Table 7. This menu has a per person price of U.S. $18.95.

Table 7. Dinner Buffet Menu Example

Quantity	Item
Choice of 3	Salads
Choice of 2	Chicken entrees
Choice of 2	Beef entrees
Choice of 2	Soups
Choice of 3	Desserts

- **Menu per person, split menu.** A sit-down dinner menu might include the choices of items listed in Table 8. This menu's per person price will vary according to the items each diner selects from each category.

Table 8. Split Dinner Menu Example

Quantity	Item Category	Items
Choice of 1	Salad	Cobb Salad
		Caesar Salad
		Green Salad
Choice of 1	Dinner entree	Roast Chicken
		Prime Rib
		Lamb Medallions

Table 8. Split Dinner Menu Example

Quantity	Item Category	Items
Choice of 1	Vegetable	Steamed Broccoli
		Sauteed Mushrooms and Onions
		Creamed Spinach
Choice of 1	Dessert	Chocolate Cake
		Ice Cream Sundae
		Blackberry Sorbet

Examples of Package Types

This topic shows examples of different types of packages.

- **Package each.** A simple reception desk package might include the items listed in Table 9. This package has a package price of U.S. $50.00.

Table 9. Reception Desk Package Example

Quantity	Item
1	8-foot table with skirting
3	Chairs
1	Waste basket
50	Name tags
3	Marker pens

- **Package per person.** A complex wedding reception package might include the items listed in Table 10. This package has a per person package price of U.S. $45.00.

Table 10. Wedding Reception Package Example

Quantity	Item	Comments
1	Top Shelf Host Bar	Includes bartender.
300	Drinks	N/A
150	Surf-and-Turf dinner menus	N/A
1	12’ x 12’ dance floor	N/A
1	DJ	N/A
6	Hours of music	N/A
2	Microphones	N/A

Table 10. Wedding Reception Package Example

Quantity	Item	Comments
1	Laptop computer	For displaying photos or slides.
1	Projector	
1	Screen	

- **Package item price.** A cash bar package might include the items listed in Table 11. This package's per person price will vary according to the numbers and types of items each person orders from each category.

Table 11. Cash Bar Example

Quantity	Item Category	Items
Any	Soft drinks	Cola
		Orange soda
		Root beer
Any	Alcohol beverages	Beer
		Wine
		Cordials
Any	Caffeine beverages	Coffee
		Tea

Process of Setting Up Menus and Packages

This topic lists the tasks typically performed by administrators when setting up property-specific menus and packages. Your company may follow a different process according to its business requirements.

To set up property-specific menus and packages, perform the following procedures:

1. "Associating a Default Catalog Category With a Property" on page 100
2. "Creating Property-Specific Products" on page 100
   a. "Adding Products to a Property" on page 101
   b. "Associating Prices With a Property-Specific Product" on page 103
   c. "Creating Assets for Property-Specific Products" on page 103
3. "Creating Property-Specific Menus" on page 104
   a. "Adding Menus to a Property" on page 104

b "Adding Items to a Property-Specific Menu" on page 106

c "Associating Prices With a Property-Specific Menu" on page 107

4 "Creating Property-Specific Packages" on page 107

a "Adding Packages to a Property" on page 108

b "Adding Items to a Property-Specific Package" on page 109

c "Associating Prices With a Property-Specific Package" on page 111

5 "Sharing Property-Specific Products With Other Properties" on page 111

6 "Ongoing Tasks for Setting Up Menus and Packages" on page 111

- "Assigning Property-Specific Products to Catalog Categories" on page 112
- "Creating Pricing Intervals for a Property-Specific Product" on page 112
- "Viewing Property Price Lists" on page 114

Associating a Default Catalog Category With a Property

As a requirement for creating property-specific products, associate a catalog category with the property. This category becomes the default catalog category for products associated with the property. When you create a property-specific product, Siebel Hospitality automatically assigns that product to the property's default catalog category.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To associate a default catalog category with a property

1 Create a new property record or select an existing property record.

For more information about setting up a property, see "Adding Property Records" on page 36.

2 Select a category in the Default Product Category field.

The selected category becomes the product category for all products created for this property.

Creating Property-Specific Products

You build all of the simple product items that are for sale at a selected property, that can become part of a menu or a package. To create property-specific products, perform these procedures:

- "Adding Products to a Property" on page 101
- "Associating Prices With a Property-Specific Product" on page 103
- "Creating Assets for Property-Specific Products" on page 103

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

Adding Products to a Property

To add product records to a selected property, follow this procedure.

NOTE: Products must be released to make them visible to users. Siebel Hospitality releases a product automatically when you complete the creation procedure. For more information about releasing products, see the chapter on releasing products and other versioned objects in *Siebel Product Administration Guide*.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To add a product to a property

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property to which you want to add a product and drill down on the property's Name field.
3. Click the Event Order/Menu Items view tab.
4. In the Event Order/Menu Items list, add a new record and complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
Type	Picklist selections are as follows: ■ **Event Order Item.** Non-F&B-related product. ■ **Menu Item.** F&B-related product.
Grouping	Identifies related groups of products. Allows users to do searches for products classified by these related groups. For example, Ice Creams could be a grouping, and this would help users to find all the ice creams that are stocked in a property. Available values vary according to the selection in the Type field.
Resource Type	Picklist selections are as follows: ■ **Critical.** Item is necessary for an event to occur. The application tries to reserve this item when a quote is created. ■ **General.** Item is noncritical; that is, not necessary for an event to occur. ■ **Non Critical.** Item is noncritical; that is, not necessary for an event to occur.
Revenue Sub Category	Select a Revenue Sub Category with which to associate this item.
Revenue Category	Read only; populated from the selected Revenue Sub Category.
Parent Revenue Category	Read only; populated from the selected Revenue Sub Category.

Field	Comments
Grouping	Allows you to associate the product with a product grouping. This allows end users to search for products based on the groupings to which they belong. Product groupings are user-defined and are specific to your company's business requirements.
Substitutes	Allows you to select products that can be substituted for the current product. Displayed choices are limited to those of the same Product Type as the current product. You can select multiple substitutes. Allows end users to select substitute products from the list of those you specify.
Recommendation Message	Enter a message that an end user can use to influence a customer to buy the product. For example, if the product is an entree, specify a wine that is compatible.
Preventative Maintenance Plan	Allows you to associate a preventative maintenance plan with the product. In the field's Preventative Maintenance dialog box, create a new record. In the Pick PM Plans dialog box, select a preventative maintenance plan. Click OK, then click OK again. After being associated with a preventative maintenance plan in this view, the product becomes visible on the Administration - Preventive Maintenance screen, Products view. For more information about preventative maintenance plans, see the chapter on preventive maintenance in *Siebel Field Service Guide*.
Start Date	First day when the product is available. Defaults to the current date.
End Date	Last day when the product is available.
Generic Product	Allows you to associate a single generic product with the current property-specific product. The application uses this information while generating a quote to map this specific product to the associated generic product specified in the opportunity. Choices are limited to products of Type = Generic, with valid start and end dates. The current product will replace the specified generic product in quotes.

5 (Optional) Click Check Description Spelling to check the spelling in the Description field.

When you save the record, Siebel Hospitality creates and releases the product, and associates it with the default catalog category for the current property.

Associating Prices With a Property-Specific Product

You can define prices for the current product for specified time periods. You can define multiple prices to cover different time periods.

NOTE: It is recommended that every product that can be part of a menu or package be assigned its own price. Even if the price of the menu or package bears no direct relationship to the sum of the prices of individual items, Siebel Hospitality may use the individual item prices to calculate how revenues are allocated.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To associate a price with a property-specific product

1. In the lower part of the Property Administration screen, Event Order/Menu Items view, click the Price subview tab.
2. On the Price list, add a new record and complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
List Price	Price of this product for the specified time period.
Start Date	First day when the specified price applies to this product. Defaults to the current date.
End Date	Last day when the specified price applies to this product.
Service Charge Inclusive	Select to include the service charge in the specified List Price. Clear to specify that the specified List Price does not include a service charge.
Tax Inclusive	Select to include tax in the specified List Price. Clear to specify that the specified List Price does not include tax.

Creating Assets for Property-Specific Products

You can create assets for the current product, and record their physical locations.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To create an asset for a property-specific product

1. In the lower part of the Property Administration screen, Event Order/Menu Items view, click the Assets subview tab.

2 On the Assets list, add a new record and complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
Asset #	Unique, system-generated number for this asset record. Can be different from the Serial Number.
Product	Currently selected product with which this asset is associated.
Status	Select a status of Active or Available to make the asset available for use. This will allow the asset to be selected for use at its property. Alternatively, select one of the other options to describe why it is not available for use.
Status Update Date	Date on which the status field was last updated.
Storage Room	Allows you to specify a physical location on the property where this asset is stored.
Serial #	User-defined code that identifies this individual asset.
Last Inventory Date	Last date on which this asset was inventoried.

Creating Property-Specific Menus

After you have created the simple F&B product items that are for sale at a selected property, you can use them to populate menus. To create property-specific menus, perform these procedures:

- "Adding Menus to a Property" on page 104
- "Adding Items to a Property-Specific Menu" on page 106
- "Associating Prices With a Property-Specific Menu" on page 107

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

Adding Menus to a Property

To add menu records to a selected property, follow this procedure.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To add a menu to a property

1 Navigate to the Property Administration screen, then the Properties view.

2 Identify the property to which you want to add a menu and drill down on the property's Name field.

3 Click the Menus view tab.

4 In the Menus list, add a new record and complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
Type	Type of menu. Determines the pricing method. Menu Per Person value is automatically selected and read only. This value provides one menu for each person. The price can be a fixed price for each person, or a variable price for each person depending on the items selected.
Grouping	Identifies related groups of menus. Allows users to do searches for menus classified by these related groups. For example, Dinner could be a grouping, and this would help users to find all the dinner menus that are accessible in a property.
List Price(s)	Read only. Can contain multiple prices, each valid for a different time period. The field shows the first price in the list. To see all prices, open the field's selection dialog box.
Split Pricing	Read-only, based on this menu's associated child items. Identifies this menu as having a variable price for each person depending on the items selected. If any of the child menu items have a Split Menu Price defined, then this check box is selected.
Fixed	If selected, end users cannot add or delete menu items, or change the quantities of menu items, in the Quote, Order, or Event Check views. Administrators, however, can add or delete menu items and change the quantities of menu items in the Administration views.
Revenue Sub Category	Select a Revenue Sub Category with which to associate this menu. For revenue allocation purposes, overrides the categories of the child menu items. For more information about revenue allocations, see "Revenue Allocations for Menus and Packages" on page 114.
Revenue Category	Read only; populated from the selected Revenue Sub Category.
Parent Revenue Category	Read only; populated from the selected Revenue Sub Category.
Grouping	Type of meal or occasion for which the menu is designated.
Recommendation Message	Enter a message that an end user can use to influence a customer to buy the menu. For example, specify that the menu is particularly suitable for formal dinners.
Start Date	First day when the menu is available. Defaults to the current date.
End Date	Last day when the menu is available.

5 (Optional) Click Check Description Spelling to check the spelling in the Description field.

Adding Items to a Property-Specific Menu

After creating a menu record, you can add menu items from the list of products that are associated with the current property. You can add one item at a time, or you can add multiple items at once.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To add one item to a property-specific menu

1. In the lower part of the Property Administration screen, Menus view, click the Menu Items subview tab.
2. On the Menu Items list, click New.
3. In the new record, complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
Name	Select an item to add to the menu. Most other fields are populated from this selection. Choices are limited to products of Type = Menu Item, with valid start and end dates.
Course #	Sequence number that determines how the menu prints in the Banquet Event Order (BEO) Report. For more information on the Banquet Event Order Report, see "About the Banquet Event Order (BEO) Report" on page 469.
Split Menu Price	Enter a price in this field to designate this item as a split menu item. When this item is added to a menu, the menu's Split Pricing field will be selected. When an item with a defined Split Menu Price is added to a quote, this price populates the item's Negotiated Price field. **NOTE:** If this menu item does not have a defined Split Menu Price, its price is irrelevant in the menu's context, because its price is based on the per person price defined for the menu.
List Price(s)	Read only. Can contain multiple prices, each valid for a different time period. The field shows the first price in the list. To see all prices, open the field's selection dialog box.
Qty	Specify how many of this menu item are included in the menu. Defaults to 1.

To add multiple items to a property-specific menu

1. In the lower part of the Property Administration screen, Menus view, click the Menu Items subview tab.
2. On the Menu Items list, click Add Items.

   Siebel Hospitality displays the Add Products dialog box.

3 In the Add Products dialog box, select each item to add to the current menu and click Add.

Siebel Hospitality displays the Menu Items list with the products you selected added to the menu.

4 In each of the menu items you entered, complete the necessary fields. Some fields are described in the table in "To add one item to a property-specific menu" on page 106.

Associating Prices With a Property-Specific Menu

You can define prices for the current menu for specified time periods. You can define multiple prices to cover different time periods.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To associate a price with a property-specific menu

1 In the lower part of the Property Administration screen, Menus view, click the Price subview tab.

2 On the Price list, add a new record and complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
List Price	Price of this menu for the specified time period.
Start Date	First day when the specified price applies to this menu. Defaults to the current date.
End Date	Last day when the specified price applies to this menu.
Service Charge Inclusive	Select to include the service charge in the specified List Price. Clear to specify that the specified List Price does not include a service charge.
Tax Inclusive	Select to include tax in the specified List Price. Clear to specify that the specified List Price does not include tax.

Creating Property-Specific Packages

After you have created the simple product items and menus that are for sale at a selected property, you can use them to populate packages. To create property-specific packages, perform these procedures:

- "Adding Packages to a Property" on page 108
- "Adding Items to a Property-Specific Package" on page 109
- "Associating Prices With a Property-Specific Package" on page 111

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

Adding Packages to a Property

To add package records to a selected property, follow this procedure.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To add a property-specific package

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property to which you want to add a package and drill down on the property's Name field.
3. Click the Packages view tab.
4. In the Packages list, add a new record and complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
Type	Type of package. Determines the pricing method. ■ **Package Each.** Fixed price for a quantity of 1 of the package, regardless of the number of people. ■ **Package Item Price.** Variable price for each person where individual item prices are broken out. ■ **Package Per Person.** Fixed price for each person where individual item prices are not broken out.
Grouping	Identifies related groups of packages. Allows users to do searches for packages classified by these related groups. For example, Audio Visual Package could be a grouping, and this would help users to find all the audio-visual packages that are accessible in a property.
UoM	Default value changes dynamically according to the selection in the Type field. Defaults to Person if Type = Package Per Person, Each if Type = Package Each, and Each if Type = Package Item Price.
Fixed	If selected, end users cannot add or delete package items, or change the quantities of package items, in the Quote, Order, or Event Check views. Administrators, however, can add or delete package items and change the quantities of package items in the Administration views.
Start Date	First day when the package is available. Defaults to the current date.

Field	Comments
End Date	Last day when the package is available.
Use System Allocation	If selected, Siebel Hospitality calculates a per person allocation for the package's child package items, while associating a package into function line items. This field is read-only under the following conditions: ■ The package is, or contains a child package that is, of Type = Package Item Price. ■ The package contains a Split Menu.

5 (Optional) Click Check Description Spelling to check the spelling in the Description field.

Adding Items to a Property-Specific Package

After creating a package record, you can add package items from the list of products that are associated with the current property. A package can include simple products, both F&B and non-F&B items. A package can also include other complex products, such as menus and other packages. You can add one item at a time, or you can add multiple items at once.

NOTE: If you add a menu or another package to the current package, Siebel Hospitality does not display the child items of the component menu or package.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To add one item to a property-specific package

1 In the lower part of the Property Administration screen, Packages view, click the Package Items subview tab.

2 On the Package Items list, click New.

3 In the new record, complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
Name	Select an item to add to the package. Most other fields are populated from this selection.
Per Person Allocation	If the current package record's Type is Package Per Person or Package Each, you can use this field to manually designate the per person monetary amount to allocate to individual items in the package. The Per Person Allocation values for package items should add up to the total price for the parent package. There is no validation check; Siebel Hospitality does not force the two to be equal. However, Siebel Hospitality does display a per person allocation total for all package items at the bottom of the Per Person Allocation column. For more information about allocations, see "Revenue Allocations for Menus and Packages" on page 114.
Split Menu	Read only. When selected, identifies a component menu as a split-price menu.
List Price(s)	Can contain multiple prices, each valid for a different time period. The field shows the first price in the list. To see all prices, open the field's selection dialog box.
Qty	Specify how many of this item are included in the package. Defaults to 1.

4 (Optional) Click Check Description Spelling to check the spelling in the Description field.

To add multiple items to a property-specific package

1 In the lower part of the Property Administration screen, Packages view, click the Package Items subview tab.

2 On the Menu Items list, click Add Items.

Siebel Hospitality displays the Add Products dialog box.

3 In the Add Products dialog box, select each item to add to the current package and click Add.

Siebel Hospitality displays the Package Items list with the products you selected added to the package.

4 For each of the items you entered, complete the necessary fields. Some fields are described in the table in "To add one item to a property-specific package" on page 109.

Associating Prices With a Property-Specific Package

You can define prices for the current package for specified time periods. You can define multiple prices to cover different time periods.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To associate a price with a property-specific package

1. In the lower part of the Property Administration screen, Packages view, click the Price subview tab.
2. On the Price list, add a new record and complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
List Price	Price of this package for the specified time period.
Start Date	First day when the specified price applies to this package. Defaults to the current date.
End Date	Last day when the specified price applies to this package.
Service Charge Inclusive	Select to include the service charge in the specified List Price. Clear to specify that the specified List Price does not include a service charge.
Tax Inclusive	Select to include tax in the specified List Price. Clear to specify that the specified List Price does not include tax.

Sharing Property-Specific Products With Other Properties

You can make property-specific products, including property-specific menus and packages, available to users at other properties. You do this by creating a property cluster that includes the products' original property and the target property with which you want to share the products, then assigning the property cluster to the users to whom you want the products to be visible at the target property. For more information about creating and assigning product clusters, see "Setting Up Property Clusters" on page 50.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

Ongoing Tasks for Setting Up Menus and Packages

This topic describes ongoing tasks that administrators perform for menus and packages on an ongoing basis, when and as needed. These ongoing tasks are as follows:

- "Assigning Property-Specific Products to Catalog Categories" on page 112
- "Creating Pricing Intervals for a Property-Specific Product" on page 112
- "Viewing Property Price Lists" on page 114

Assigning Property-Specific Products to Catalog Categories

You can associate property-specific products with catalog categories other than the default catalog category for that property. You do this by associating additional catalog categories with a property, and then adding products to those categories. For more information about default catalog categories for properties, see "Associating a Default Catalog Category With a Property" on page 100.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To assign a property-specific product to a catalog category

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property to which you want to add a catalog category and drill down on the property's Name field.
3. Click the Catalog Categories view tab.
4. In the Catalog Categories list, add a new record and complete the necessary fields.

   Some fields are described in the table that follows.

Field	Comments
Effective Start Date	First day when the category applies to this property. Defaults to the current date.
Effective End Date	Last day when the category applies to this property.
Private	Select to make the category visible only to users belonging to the access groups associated with it. If the category is private, all of its associated products will also be private.
Count	Number of products associated with this category.

5. On the Products list in the lower part of the Catalog Categories view, add a record for the product you want to associate with the selected catalog category.

Creating Pricing Intervals for a Property-Specific Product

You can create new pricing intervals for products, and remove products from being sold during specified times, by creating additional pricing intervals.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To create a pricing interval for a property-specific product

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property at which you want to create a new pricing interval for a product, and drill down on the property's Name field.
3. Depending on the type of product for which you want to create a new pricing interval, perform one of the steps in the table that follows.

For this product type:	Click this view tab:
Event order item	Event Order/Menu Items
Menu item	Event Order/Menu Items
Menu	Menus
Package	Packages

4. Select the product for which you want to create a new pricing interval.
5. Click the Price subview tab.
6. Select the price list item for which you want to create a new price interval, and click New Pricing Interval.

   Siebel Hospitality creates a duplicate of the selected record, with all fields filled from the original record except for List Price, Start Date, and End Date.
7. In the List Price field, enter a price to be effective during the new time interval.
8. Enter dates in the Start Date and End Date fields.

   Note the following characteristics of the resulting records:

   - The Start Date of the new price interval record defaults to the date and time when that record was created.
   - Siebel Hospitality does not allow price records with overlapping time intervals. Make sure the time interval covered by the Start Date and End Date you specify does not overlap the time interval covered by the Start Date and End Date of any other price records.
   - If the previous price record does not have an End Date, when you save the new price interval record, the Start Date of the new price interval record becomes the End Date of the previous price record.

NOTE: To remove a product from sale for a specific time interval, create pricing interval records for a product that leave that time interval uncovered. For example, to remove a product from sale from January 11, 2009 through February 11, 2009, and then put it on sale again, enter a value of 1/11/2009 12:00:00 AM as the End Date of the original record and a value of 2/12/2009 12:00:00 AM as the Start Date of the new pricing interval record.

Viewing Property Price Lists

You can see the prices being charged for all the product items at a selected property, regardless of type, in one view.

This task is a step in "Process of Setting Up Menus and Packages" on page 99.

To view a property price list

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property with the price list you want to view, and drill down on the property's Property Name field.
3. Click the Price List Items view tab.

   Siebel Hospitality displays a list of all products that are for sale at the current property. Some fields are described in the table that follows.

Field	Comments
Service Charge Inclusive	Select to include the service charge in the specified List Price. Clear to specify that the specified List Price does not include a service charge.
Tax Inclusive	Select to include tax in the specified List Price. Clear to specify that the specified List Price does not include tax.
Revenue Sub Category	Select a Revenue Sub Category with which to associate this item.
Revenue Category	Read only; populated from the selected Revenue Sub Category.
Parent Revenue Category	Read only; populated from the selected Revenue Sub Category.
Start Date	First day when the product is available. Defaults to the current date.
End Date	Last day when the product is available.

4. To modify a product price, select an existing record and change the value in its List Price field.

Revenue Allocations for Menus and Packages

In the context of Siebel Hospitality's menus and packages functionality, *allocation* means how much revenue is assigned to each item in a menu or package. Because different items may belong to different revenue streams, you can designate what portion of the total revenue Siebel Hospitality allocates to each item in a package.

The revenue allocation for a product goes to a revenue category. A menu has a designated revenue category; its individual menu items also have revenue categories that might be different from the parent menu's revenue category. In this case, the parent menu's revenue category overrides the revenue categories of its child items, and all revenue for a menu goes to its revenue category. A package does not have a revenue category, but its individual package items do. In the case of a package, the revenue is allocated to the revenue categories of the child items. You can calculate the revenue allocation manually, or Siebel Hospitality can calculate the revenue allocation automatically.

The revenue allocation for a menu is determined by the parent menu record's current list price and its revenue category. The revenue allocation for a package is determined by whether system allocation is selected in the parent package record, and by the revenue categories and quantities of the individual child package items. In each child package item, Siebel Hospitality first looks at the per person allocation. If the per person allocation does not have a value, Siebel Hospitality then looks for the list price.

Examples of revenue allocations are as follows:

- **Event order item or menu item example.** Consider the case of a single menu item or event order item, such as a television set. This simple product belongs to the Audio-Visual revenue category. Its price is $20.00. All of that $20.00 is attributed to the Audio-Visual revenue category.
- **Menu example.** Consider a menu with two F&B items, steak and ice cream. Steak is associated with the Dinner Entrees revenue category, while ice cream is associated with the Dinner Dessert revenue category. The menu itself, however, is associated with the Dinner Entree revenue category. Consequently, the entire price of the menu, including the ice cream, will go to the Dinner Entree revenue category.
- **Package example.** Finally, consider a package, in which you can specify how much revenue to allocate to each of the package items' revenue categories. The package has three items with individual prices of $10.00 each, for a total of $30.00. If the items are sold separately, the full prices are allocated to the products' respective revenue categories.

  The package, however, is priced at $20.00. If you calculate the allocations manually, you might designate the allocations as Product A = $10.00, Product B = $5.00, and Product C = $5.00. If you create system-generated allocations, Siebel Hospitality performs a calculation that is weighted based on the list prices and quantities of the component products. In the case of a package that has three items with individual prices of $10.00 each, where the package price is $20.00, an automatic allocation gives each product's revenue category $6.66.

  NOTE: When calculating allocations, consider the quantities of the items involved. For example, if an a package line item's list price is $50.00 and the quantity is 2, then that item contributes $100 to the price of the package.

The scenarios that follow illustrate several system-calculated revenue allocations.

Scenario 1: Two-Item Package

This scenario, shown in Table 12, describes a basic package containing two items.

Table 12. Two-Item Package Example

Package Breakdown	Qty	List Price	Negotiated Price	Unit Net Price	Per Person Allocation
Package Per Person	1	100.00	100.00	100.00	N/A
Event Order Item	1	50.00	N/A	N/A	45.45 = (50/(50+60))*100
Menu Item	1	60.00	N/A	N/A	54.55 = (60/(50+60))*100

Siebel Hospitality determines the revenue contribution percentage of each item based on its list price. The list price of an item divided by the total of the item list prices equals the contribution percentage of that item. Multiply this contribution percentage by the unit net price of the package to determine how much that item contributes to the price of the package.

Scenario 2: Two-Item Package With Discounted Price

This scenario, shown in Table 13, describes a basic package containing two items. This scenario is similar to "Scenario 1: Two-Item Package" on page 116, except that the customer has negotiated a lower price.

Table 13. Two-Item Package With Discounted Price Example

Package Breakdown	Qty	List Price	Negotiated Price	Unit Net Price	Per Person Allocation
Package Per Person	1	100.00	80.00	80.00	N/A
Event Order Item	1	50.00	N/A	N/A	36.36 = (50/(50+60))*80
Menu Item	1	60.00	N/A	N/A	43.64 = (60/(50+60))*80

Siebel Hospitality determines the revenue contribution percentage of each item based on its list price. The list price of an item divided by the total of the item list prices equals the contribution percentage of that item. Multiply this contribution percentage by the unit net price of the package to determine how much that item contributes to the price of the package.

Scenario 3: Three-Item Package With Menu Per Person

This scenario, shown in Table 14, describes a basic package that includes a menu per person as a line item.

Table 14. Three-Item Package With Menu Per Person Example

Package Breakdown	Qty	List Price	Negotiated Price	Unit Net Price	Per Person Allocation
Package Per Person	1	50.00	50.00	50.00	N/A
Event Order Item	1	20.00	N/A	N/A	(20/(20+10+25))*50
Menu Item 1	1	10.00	N/A	N/A	(10/(20+10+25))*50
Menu Per Person	1	25.00	N/A	N/A	(25/(20+10+25))*50
Menu Item 2	1	N/A	N/A	N/A	N/A
Menu Item 3	1	N/A	N/A	N/A	N/A

The contribution percentage for the menu per person is based on the list price of the menu per person. (However, if the menu per person is a split menu, Siebel Hospitality ignores it and does not include it in any calculations.)

Scenario 4: Package Within a Package

This scenario, shown in Table 15, describes a package within a package.

Table 15. Package Within a Package Example

Package Breakdown	Qty	List Price	Negotiated Price	Unit Net Price	Per Person Allocation
Package Per Person 1	1	50.00	50.00	50.00	N/A
Event Order Item	1	20.00	N/A	N/A	22.22 = (20/(20+25))*50
Package Per Person 2	1	25.00	N/A	N/A	N/A
Menu Item 1	1	20.00	N/A	N/A	(20/(20+18))*((25/(20+25))*50)
Menu Per Person	1	18.00	N/A	N/A	(18/(20+18))*((25/(20+25))*50)
Menu Item 2	1	10.00	N/A	N/A	N/A
Menu Item 3	1	20.00	N/A	N/A	N/A

To calculate the contribution percentages of the items in the child package, the system first must calculate the contribution percentage of the child package and then calculate the contribution percentages of its child line items to the contribution percentage of the child package. A breakdown of the calculation steps is as follows:

1. The price of Package Per Person 1 is 50.
2. This 50 is made up of Event Order Item and Package Per Person 2.
3. The per person allocation for Event Order Item out of the 50 is 22.22.
4. This leaves 27.78 of the 50 for Package Per Person 2.
5. Siebel Hospitality now determines how to allocate the 27.78 to the items in Package Per Person 2.
6. Siebel Hospitality determines the contribution percentage of Menu Item 1 and Menu Per Person within Package Per Person 2.
7. Menu Item 1's contribution percentage equals ((20/(20+18)).
8. Menu Per Person's contribution percentage equals (18/(20+18)).
9. The contribution percentages of Menu Item 1 and Menu Per Person, multiplied by 27.78, determine how much of the 27.78 to allocate to each of the respective line items.

NOTE: If you have another level of a package within a package, the same iterative process should be followed to determine the per person allocations.

8 Setting Up Inventory Controls

This chapter describes how to set up inventory controls for function spaces, sleeping rooms, and suites as well as how to define out-of-order and unavailable function spaces. It includes the following topics:

- Process of Setting Up Inventory Controls on page 120
- Viewing Inventory Controls and Visibility on page 120
- Defining Function Space and Suite Inventory Controls on page 121
- Defining Sleeping Room Inventory Controls on page 124

Process of Setting Up Inventory Controls

This topic lists the tasks typically performed by administrators when setting up inventory controls for function spaces, sleeping rooms, and suites. Your company may follow a different process according to its business requirements.

To set up inventory controls for function spaces, sleeping rooms, and suites, perform the following procedures:

1. Viewing Inventory Controls and Visibility on page 120
2. Defining Function Space and Suite Inventory Controls on page 121
3. Defining Sleeping Room Inventory Controls on page 124

Viewing Inventory Controls and Visibility

The inventory control records that can be viewed by a user depends on the visibility layers. Three different layers of visibility can be assigned to users. To assign visibility, you must add the appropriate views to each user's responsibilities. Table 16 lists each visibility option and the appropriate records that the users are able to access.

Table 16. Inventory Control Visibility

Visibility Tier	Description
My Properties	Users who have a specific property assigned to them should only see inventory control records relating to that particular property.
My Clusters Properties	Users who are members of a specific cluster should only see inventory control records relating to the properties in their particular clusters.
All Properties	Users who are capable of viewing all properties (for example, administrators) should see inventory control records relating to all properties.

See *Using Siebel Tools* for more information on how to add views to user responsibilities.

Related Topics

- Assigning Clusters to a User on page 52
- Updating the Property Team on page 41
- Using Cluster Visibility on page 52

Defining Function Space and Suite Inventory Controls

An administrator can create inventory controls for specific spaces, categories, and suites.

This task is a step in Process of Setting Up Inventory Controls on page 120.

Authorization, Overbook, and Option Level Inventory Controls

Authorization level inventory controls are specified to limit the number of reserved, concurrent bookings that can be made for a category or suite. These inventory controls must be created for each category. They can only be created for a category or suite. The value entered for the authorization level can be less, equal, or more than the capacity. When this limit is reached, the inventory status remains Unreserved unless overbook and option level inventory controls are defined for the function space.

Overbook and option level inventory controls can be specified to limit the number of overbookings and options that can be made for a function space. These inventory controls are used to determine the number of overbooked or optioned bookings that the function spaces can support.

NOTE: You must create separate authorization, option, and overbook level inventory controls for each function space. Inventory controls do not apply across an entire property.

For example, the function space category titled Small has Salon A, B, C, and D as its components. This category can be reserved four times, and this value is automatically entered into the Capacity field in the Inventory Control list.

If you specify an authorization level of 5, this function space can be reserved up to a maximum of five times even though it may have capacity for four. After reaching this limit, you can either option or overbook the function space, provided you have already defined these types of inventory controls. If you specify an option level of 2 and an overbook level of 1 for the function space, you can option it twice and overbook it once. If you try to option or overbook the space beyond these limits, the inventory status will remain Unreserved.

Procedure for Defining Function Space Inventory Controls

This procedure assumes that the administrator has already created the appropriate function spaces for the property. For more information, see Creating Function Space Categories for a Property on page 59.

To define function space inventory controls

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record, and then click the link in the Property Name field.
3. Click the Inventory Control view tab.

   You are brought to the Function Space view.
4. In the Inventory Controls list, create a new record.

5 Enter a start date and end date for the inventory control.

The start and end date values are validated. The Start Date value must be less than or equal to the End Date value and the duration between Start Date and End Date cannot be greater than one year.

6 In the Function Space field, click the select button, and choose the appropriate specific space, category, or suite.

NOTE: The function spaces displayed in the Pick Function Space dialog box include only those spaces that are effective throughout the entire specified time period.

7 Choose the appropriate rule from the Rule Type drop-down list:

- Choose Authorization Level to define a limit for the number of bookings that can be reserved concurrently for this function space on this date. Note that this option is only available if you are defining the rule for a function space or suite category.
- Choose Option Level to define a limit for the number of bookings that can be optioned for this function space on this date.
- Choose Overbook Level to define a limit for the number of bookings that can be overbooked for this function space on this date.

8 In each authorization field, set the rule levels for each day of the week.

You can specify different levels of authorization, optioning, and overbooking for the same day.

If a rule date range spans less than a week, then only the days of the week included in the range are editable under the Rules. For example, if the start date is January 24, 2005 and the end date is January 26, 2005, you can only enter values for Monday, Tuesday, and Wednesday. The rest of the days are read-only.

9 Select the inventory control records that you want to apply, and click Apply.

You can select multiple records from the Rules drop-down list and apply the inventory controls for all of them at once.

The results of the applied inventory controls appear in the Valid Authorizations Levels list, starting from the first day applied.

NOTE: Inventory control rules can overlap. When you apply a new rule and it has overlapped values, the new rule overwrites the old record values or creates new values if necessary.

Information Display Options in the Valid Authorization Levels List

There are various controls that can be used with the Valid Authorizations list. These include:

- Dates/Notes button
- Paging buttons

Dates/Notes Button

Click this button to view information about special dates, holidays, or sell notes for the displayed days. If any of the days shown in the Valid Authorization Levels list have special dates, holidays, or sell notes information associated with them, this information appears in the Special Dates/Sell Notes dialog box.

Paging Buttons

There are four paging buttons that you can use to navigate within this view: Previous column set, Previous column, Next column, and Next column set. These buttons are located in the upper-right corner of the view.

The paging buttons are:

- **Next column.** Use this button to move forward one day at a time.
- **Previous column.** Use this button to move backward one day at a time.
- **Next column set.** Use this button to move forward one week at a time.

  For example, if the chosen date was Sunday October 10, 2004, when you click the Next column set button, the view moves forward one week to display Sunday October 17, 2004.
- **Previous column set.** To move backward one week, click the Previous column set button.

Querying Function Space Inventory Controls

When function space inventory controls are defined and applied in the Inventory Controls list, they then appear in the Valid Authorization Levels list underneath. This list allows you to query for information using the standard Query button. However, you can also query for specific dates by clicking the Query Date button.

To query for function space inventory controls on specific dates

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record, and then click the link in the Property Name field.
3. Click the Inventory Control view tab.
4. Click the Function Space link to navigate to that view.
5. In the Valid Authorization Levels list, click the Query Date button.

   The Query Date dialog box appears.
6. Click the calendar select button, and choose the appropriate date.
7. Click Go.

   The date for which you queried and the following seven days are displayed.

Editing Function Space Inventory Controls

If you only need to edit the inventory controls for a few days, it is recommended that you perform this action in the Valid Authorizations list. However, if you need to change inventory controls for a longer time period, it is recommended that you create new inventory controls in the Inventory Controls list and apply the rules. The new rules override any existing inventory controls that had been applied for this time period.

NOTE: Changes in the Valid Authorization view are automatically applied. You do not need to click Apply to apply your changes.

Defining Sleeping Room Inventory Controls

An administrator can create inventory controls for sleeping rooms. This process assumes that the administrator has already created the appropriate sleeping rooms for the property. For more information, see Creating Sleeping Rooms on page 65.

This task is a step in Process of Setting Up Inventory Controls on page 120.

Group authorized level inventory controls are specified to limit the number of reserved, concurrent bookings that can be made for sleeping rooms. These inventory controls must be created for each sleeping room type. The value entered for the group authorized level can be less, equal, or more than the capacity. When this limit is reached, the inventory status remains Unreserved unless you overbook the sleeping room. Unlike function spaces, no limits are defined for overbooking sleeping rooms. This lack of limitation means that as soon as the group authorized level limit is reached, you can then choose to overbook the sleeping rooms as many times as needed.

To define sleeping room inventory controls

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record, and then click the link in the Property Name field.
3. Click the Inventory Control view tab.
4. Click the Sleeping Room link to navigate to that view.
5. In the Inventory Controls list, create a new record.
6. Enter a start and end date for the inventory control.

   The start and end date values are validated. The Start Date value must be less than or equal to the End Date value and the duration between Start Date and End Date cannot be greater than one year.
7. In the Sleeping Room field, click the select button, and choose the appropriate sleeping room type.

   NOTE: The sleeping room types displayed in the Pick Room Type dialog box include only those types that are effective throughout the entire specified time period.

8 Choose the appropriate rule from the Rule Type drop-down list:

- Choose Group Authorized Level to define a limit for the number of reserved, concurrent bookings that can be made for this sleeping room type.
- Choose Group Optimal Level to enter the group optimal value for this sleeping room type. This value represents what the revenue manager thinks is the ideal level between group and transient availability and is used for sleeping room calculations.

9 Select the inventory control records that you want to use, and click Apply.

The results of the applied inventory controls appear in the Total Group Availability list, starting from the first day applied.

Information Display Options in the Total Group Availability List

There are various controls that can be used with the Total Group Availability list. These include:

- **Dates/Notes button.** See Dates/Notes Button on page 123 for more information.
- **Paging buttons.** See Paging Buttons on page 123 for more information.
- **Tentative/Without Tentative button.** See Tentative/Not Tentative Button on page 323 for more information.

Editing Sleeping Room Inventory Controls

If you only need to edit the inventory controls for a few days, it is recommended that you perform this action in the Total Group Availability list. However, if you need to change inventory controls for a longer time period, it is recommended that you create new inventory controls in the Inventory Controls list and apply the rules. The new rules override any existing inventory controls that previously applied for this time period.

NOTE: Changes in the Total Group Availability view are automatically applied. You do not need to click Apply to apply your changes.

Querying Sleeping Room Inventory Controls

When sleeping room inventory controls are defined and applied in the Inventory Controls list, they are then displayed in the Total Group Availability list underneath. This list allows you to query for information using the standard Query button. However, you can also query for specific dates by clicking the Query Date button.

This task is a step in Process of Setting Up Inventory Controls on page 120.

To query for sleeping room inventory controls on specific dates

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record, and then click the link in the Property Name field.
3. Click the Inventory Control view tab.
4. Click the Sleeping Room link to navigate to that view.
5. In the Total Group Availability list, click the Query Date button.

   The Query Date dialog box appears.
6. Click the calendar select button and choose the appropriate date.
7. Click Go.

   The date for which you queried and the following seven days are displayed.
8. Complete the rest of the fields, specifying the start and end duration and the reason the function space is out of order, and then save the record.

   NOTE: You can drill down on the Start Date Time value to navigate to the Function Space Diary where the selected date and the appropriate property are displayed.

9 Defining Day Parts, Status Indicators, and Setup Style Translations

This chapter describes how to set up a property's day parts, status indicators, and setup style translations using Siebel Hospitality. It includes the following topics:

- Function Space Administration on page 128
- Process of Defining Day Parts, Status Indicators, and Setup Style Translations on page 128
- Setting Up Property Day Parts on page 128
- Defining Function Space and Asset Inventory Status Indicators on page 129
- Setting Up Function Space Setup Style Translations on page 132

Function Space Administration

The Function Space Administration screen is used to set up a property's day parts, and to define status indicators for the Function Space Diary. The diary is used by sales representatives, event managers, and revenue managers to manage day-to-day bookings of function space and optimize event operations.

An administrator can also use the Function Space Administration screen to set up the translation table used to generate quotes.

Process of Defining Day Parts, Status Indicators, and Setup Style Translations

This topic lists the tasks typically performed by administrators when setting up day parts, status indicators, and setup style translations. Your company may follow a different process according to its business requirements.

To set up day parts, status indicators, and setup style translations, perform the following procedures:

1. Setting Up Property Day Parts on page 128
2. Defining Function Space and Asset Inventory Status Indicators on page 129
3. Setting Up Function Space Setup Style Translations on page 132

Setting Up Property Day Parts

Before the Function Space Diary can be used, either the administrator or the corporate revenue manager must segment the operational day into periods of time and then set up these day parts for the Function Space Diary. Display-day parts are set up at the corporate level and then applied to each property. In the Function Space Diary, the user can select the Day/Day-Part display option to view each day with the time axis divided into the defined day parts.

NOTE: It is recommended that administrators activate the Audit Trail option so that changes to existing records are tracked. The Audit Trail Engine must be configured to use the Audit Trail option. For more information on configuring and using Audit Trail, see *Siebel Applications Administration Guide*.

This task is a step in Process of Defining Day Parts, Status Indicators, and Setup Style Translations on page 128.

To set up day parts

1. Navigate to the Property Administration screen > Day Parts list.

2 In the Day Parts list, create a record, complete the fields, and save the record.

The following table describes some of the fields.

Field	Comments
Day Part Name	The name of the day part. For example, Morning.
Start Time	The start time of the day part.
End Time	The time that the day part ends.
Comments	Notes for the corresponding Day Part record.

NOTE: Day parts can span two different days. For example, a day part might run from 10 p.m. until 3 a.m. However, day parts must only span one 24-hour time period.

To validate day parts

1 Navigate to the Property Administration screen > Day Parts list.

2 Click Validate. If there are any gaps or overlaps between the day parts, a dialog box is displayed prompting you to recheck the day part definitions. A check is also run to make sure that the sum of all day parts totals 24 hours. If the day parts are validated, then focus will move to the last day part in the list.

Defining Function Space and Asset Inventory Status Indicators

Revenue managers can manage the display of function space in the Function Space Diary by specifying the colors used to denote the inventory status of function spaces as well as specifying the line patterns that signify setup and tear-down times.

This section contains the following sections, and is a step in Process of Defining Day Parts, Status Indicators, and Setup Style Translations on page 128.

- Defining Turntime and Time Interval Information for Function Space Display on page 129
- Defining Active and Backup Information on page 130
- Defining Function Inventory and Asset Inventory Status Display Colors on page 130

Defining Turntime and Time Interval Information for Function Space Display

The revenue manager typically defines the display patterns (for example cross-hatched, downward hatched, and so on), that denote setup time and tear-down time in the Function Space Diary.

This task is a step in Defining Function Space and Asset Inventory Status Indicators on page 129.

To define turntime and time interval information

1. Navigate to the Function Space Administration screen > Function Space Diary Administration form.
2. In the FSD Administration form, complete the fields.
   a. In the Turntime Information section, select the display pattern type in the Setup Time and Tear Down Time fields.

      For example, select CROSS HATCHED.

   b. In the Time Interval Information section, select values in the Time Scale, Start Time, and End Time fields.

      For example, select Time Scale = Day/Hour. In this case, defining the time interval means that the Diary would be displayed in Day/Hour.

Defining Active and Backup Information

Colors for both active and backup bookings can be defined. The colors defined here are used to differentiate between the two types of bookings in the Function Space Diary. For example, if blue is defined as the color for backup bookings, these bookings will appear with a blue border in the Function Space Diary.

This task is a step in Defining Function Space and Asset Inventory Status Indicators on page 129.

To define active and backup colors

1. Navigate to the Function Space Administration screen > Function Space Diary Administration form.
2. In the Active & Backup Information section, select colors in the Active Function Space field and Backup Function Space field.

   For example, select Blue and Yellow.

Defining Function Inventory and Asset Inventory Status Display Colors

The color scheme for inventory and asset statuses can also be defined. By default, the Function Status list includes:

- Actualized
- Dependency
- Ineffective
- Option Reserved
- Optioned

- Out of Order
- Overbooked
- Reserved
- Reserved Beyond Capacity
- Reserved Shifted
- Temporary
- Unavailable Instance

NOTE: It is also possible to map the Unreserved status to a color. However, it is recommended that this should generally not be done as the diary can become cluttered.

Each of these function space inventory statuses can be mapped to a different color for easy identification in the function space diary.

The Inventory Status list for asset inventory includes:

- Not Available
- Not Booked
- Not Enough Assets
- Booked
- Double Booked
- Re-rent

NOTE: In this list, the user should map the booked and double-booked asset inventory status because the other statuses unnecessarily fill up the asset inventory Gantt control chart.

This task is a step in Defining Function Space and Asset Inventory Status Indicators on page 129.

To assign status colors to inventory and assets

1. Navigate to the Function Space Administration screen > Function Space Diary Administration form.
2. Scroll down to the Function Color Schema list, and then click New.
3. In the new record, select an inventory status, and assign a color.
4. Scroll down to the Inventory Status Color Schema list, and then click New.
5. In the new Asset Inventory record, select a status and assign a color.

Setting Up Function Space Setup Style Translations

The Setup Style Translation view allows the administrator to specify the required area per attendee for previously defined setup styles. This translation table is used during the process of generating quotes to launch function space availability checks.

This task is a step in Process of Defining Day Parts, Status Indicators, and Setup Style Translations on page 128.

To set up function space setup style translations

1. Navigate to the Function Space Administration screen > Set Up Style Translation list.
2. In the Set Up Style Translation list, click New.
3. In the new record, select a predefined setup style, and define the Approximate Square Feet or Square Meters required per attendee.

   These fields are mutually exclusive; filling one automatically converts and populates the other field.
4. If applicable, add comments, and then save the record.

10 Setting Up Charge Codes, Taxes, and Service Charges

This chapter describes how to associate charge codes, taxes, and service charges with a property. It includes the following topics:

- Hospitality Charge Codes, Taxes, and Service Charges on page 134
- Process of Setting Up Charge Codes, Taxes, and Service Charges on page 134
- Revenue Category Administration on page 135
- Associating Revenue Categories with Products on page 135
- Service Charge Administration on page 136
- Tax Code Administration on page 138
- Charge Code Administration on page 140
- Reviewing Property-Specific Taxes and Service Charges on page 143

Hospitality Charge Codes, Taxes, and Service Charges

In Siebel Hospitality, taxes are associated with properties because different properties have different taxes that are regulated by geographic location. However, taxes may be shared also by multiple properties in the same vicinity. Taxes are associated with service charges because some service charges may be subject to federal, state, or county tax. Charge codes are the mechanism by which taxes and service charges are associated with products. Each charge code consists of a group of taxes, service charges, or both that are applied to a product based upon the product's revenue subcategory and the event's type.

Charge codes can be associated with multiple taxes and multiple service charges. Service charges can also be associated with multiple taxes and multiple properties. Taxes, in turn, can be associated with multiple properties.

The process of defining charge codes, taxes, and service charges makes it possible for an event manager to choose a product for an event and have charge codes, taxes, and service charges automatically assigned to the line items. For example, a charge code can be associated with two taxes (one for Berkeley and one for Los Angeles) and with two service charges (one that is taxable and one that is not).

An administrator can define taxes with their applicable properties, set up service charges and the taxes and properties that are applicable to them (a service charge may be taxed), and create charge codes using a set of administrative screens and views.

Process of Setting Up Charge Codes, Taxes, and Service Charges

This topic lists the tasks typically performed by administrators when setting up charge codes, taxes, and service charges. Your company may follow a different process according to its business requirements.

To set up charge codes, taxes, and service charges, perform the following procedures:

- Revenue Category Administration on page 135
- Associating Revenue Categories with Products on page 135
- Service Charge Administration on page 136
- Tax Code Administration on page 138
- Charge Code Administration on page 140
- Reviewing Property-Specific Taxes and Service Charges on page 143

Figure 5 illustrates the process flow for the tasks administrators typically perform to set up charge codes, taxes, and services charges. These tasks include:

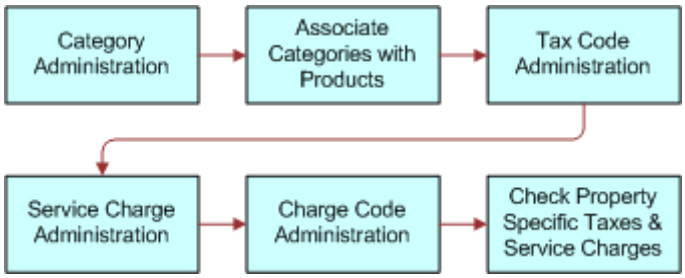


Figure 5. Tax and Services Charges Administration Business Process Flow

Revenue Category Administration

During revenue category administration, the administrator defines parent categories, categories, and subcategories. Revenue category administration consists of the following tasks:

- Creating Revenue Parent Categories
- Creating Revenue Categories
- Creating Revenue Subcategories

For more information on these tasks, see Creating Hospitality Revenue Categories and Revenue Subcategories on page 75.

Associating Revenue Categories with Products

After parent revenue categories, revenue categories and revenue subcategories are defined, the administrator can associate the categories with hospitality products and charge codes.

This task is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 134.

To associate revenue categories with products

1. Navigate to the Administration - Product screen > Products list view.
2. In the products list, query for and select the required product.
3. In the product record, select the appropriate value in the Revenue Subcategory field.

   The Revenue Category and Revenue Parent Category fields are automatically populated.
4. Save the product record.

Service Charge Administration

Service Charges are associated with a specific property, and they are only included in the calculation for a product if the following conditions exist:

- The service charge is associated with both a charge code linked to the Business Type (local or group) of an event quote and the product's revenue subcategory.
- The service charge is applicable at the property where the event is being held.

Service charges and taxes are time-dependent; both have a start date and an end date. Service charge and tax date applicability is based on when the function with which the line item is associated occurred. Because multiple functions can be associated with each order and these calculations are performed on an order basis, service charges and taxes may be different for different functions on one order. For example, one function occurs on 12/31/03 and another occurs on 1/1/04. A new set of taxes and service charges become effective at the beginning of the new year. If a function spans two days, then the tax applicability date is the first day.

A service charge is a fee applied to a product or service. An administrative fee is a type of service charge specific to a property. For example, an energy fee is an administrative fee that is added to a room charge. Service charges can be taxable, depending on the tax regulations for the property. Taxes are usually associated with service charges at the time the service charge is defined, although the tax can be added a later date.

There are two levels of visibility for Service charges as follows:

- **All Service Charges.** This view is used to manage all service charges for a particular property. This view would be used by a property revenue manager at a specific property to manage the service charges for the property with which the user is associated.
- **All Service Charges Across Properties.** This view is used to manage all service charges for all properties in your organization's chain of properties. This view would be used by a corporate property revenue manager to manage service charges for all properties.

This section contains the following topics, and is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 134.

1 Creating a Service Charge on page 136

2 Associating a Service Charge with a Property on page 137

Creating a Service Charge

Use the following procedure to define service charges for the property.

This task is a step in Service Charge Administration on page 136.

To create a service charge

1 Navigate to the Tax Service Admin screen > Service Charges List view.

2 In the Service Charges list, create a new record and complete the fields.

Some of the fields are described in the following table.

NOTE: You can enter data in either the Amount or Percent field, but not both.

Field	Comments
Name	The name of the service charge.
Description	The description of the service charge.
Percent	Service charge based on a percentage. The service charge amount is based on this percent value multiplied by the price for the line item.
Amount	Service charge based on a flat fee. The flat fee is a preset amount.
Start Date	Date the service charge becomes active.
End Date	Date the service charge becomes inactive.
Currency	The monetary unit of measure.
Taxable	Check box that indicates whether or not the service charge is taxable.
City	City in which the service charge applies. It may apply in many different cities depending on the properties associated with the service charge.
State	State in which the service charge applies. This field is automatically populated when the City field is completed.

3 Save the record.

4 If the service charge is taxable, click the link in the Name field, and select the Taxes view tab.

5 In the Taxes list, create a new record, and from the Add Taxes dialog box, select the tax, and then click OK.

NOTE: The Taxable flag is for informational purposes only.

Associating a Service Charge with a Property

Use the following procedure to associate a service charge with a property.

This task is a step in Service Charge Administration on page 136.

To associate a service charge with a property

1 Navigate to the Tax Service Admin screen > Service Charges List view.

2 In the Service Charges list, query for the required service charge.

3 Click the link in the Name field, and select the Properties tab.

4 In the Properties list, create a new record.

5 In the new record, click the select button in the Name field, select a property, and save the record.

The remaining fields are automatically populated with the property information.

Tax Code Administration

Taxes on a hospitality product can be a flat amount (for example, $5) or a percentage, and have defined effectivity dates. Taxes are defined on a global basis and are later associated with individual properties. Using charge codes, taxes are calculated based on the products associated with an order. When a flat tax is calculated during the Trial Check or Post Check process, the flat amount (for example, $2) is applied to each quantity of the product used.

An occupancy tax is a flat tax assessed for room usage. For example, if a group uses Salon C, then a tax of $100 is levied regardless of the size of the group.

Service charges and taxes are time-dependent; both have a start date and an end date. Service charge and tax date applicability is based on when the function with which the line item is associated occurs. Because multiple functions may be associated with each order and these calculations are done on an order basis, service charges and taxes may be different for different functions on one order. For example, a function might be held on 12/31/04 and another on 1/1/05, and a new set of taxes and service charges are effective on 01/01/05. If a function spans two days, then the tax applicability date is the first day.

Taxes must be defined before they can be associated with charge codes, service charges, and properties.

There are two levels of visibility for Service charges:

- **All Taxes.** This view is used to manage all taxes for a particular property. This view would be used by a property revenue manager at a specific property to manage the taxes for the property with which the user is associated.
- **All Taxes Across Properties.** This view is used to manage all taxes for all properties in the organization's chain of properties. This view would be used by a corporate property manager to manage taxes for all properties.

This section contains the following topics, and is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 134.

1 Creating a Tax Code on page 139

2 Associating a Tax Code with a Property on page 139

3 Associating Tax Codes with Service Charges on page 140

Related Topics

- Generating an Event Check on page 452
- Service Charge Administration on page 136

Creating a Tax Code

Use the following procedure to create tax codes.

This task is a step in Tax Code Administration on page 138.

To create a tax code

1. Navigate to the Tax Service Admin screen > Tax List view.
2. In the Taxes list, create a new record, and complete the fields.

   Some of the fields are described in the following table.

   NOTE: You can enter data in either the Amount or Percent field, but not both.

Field	Comments
Name	The name of the tax.
Percent	The tax defined as a percentage. The amount of tax charged is the percent value multiplied by the price for the line item.
Amount	Tax defined as a flat fee. The flat fee is a preset amount.
Start Date	The date the tax becomes active.
End Date	The date the tax becomes inactive.
Currency	The currency of the tax. Defaults to the default currency of the application.
City	City in which the tax applies. It may apply in many different cities depending on the properties associated with the tax.
State	State in which the tax applies. This field is automatically populated when the City field is completed.

Associating a Tax Code with a Property

Use the following procedure to associate a tax code with a property.

This task is a step in Tax Code Administration on page 138.

To associate a tax with a property in Hospitality

1. Navigate to the Tax Service Admin screen > Tax List view.
2. In the Taxes list, query for the tax code, and click the link in the Name field.
3. In the Properties list, create a new record.

4 In the Add Properties dialog box, select the property you want to associate with the tax, and then click OK.

The remaining fields are automatically populated with the property information.

Repeat Step 3 and Step 4 until all applicable taxes are associated.

Associating Tax Codes with Service Charges

Some service charges may be taxable, which requires the administrator to associate the service charge codes with the tax codes.

This task is a step in Tax Code Administration on page 138.

To associate a tax code with a service charge

1 Navigate to the Tax Service Admin screen > Service Charge List view.

2 In the Service Charges list, query for the required service charge record,

3 Click the link in the Name field, and then click the Taxes view tab.

4 In the Taxes list, click New, select the tax code, and save the record.

The remaining fields are automatically populated with the tax code information.

5 Repeat this task for each tax code that needs to be associated with the service charge.

Charge Code Administration

Charge codes are collections of tax codes and service charges. A charge code is an identifier that links taxes and service charges to products and can be used to distinguish between group and local business. For each charge code, there is an associated business type. The business type is selected at the event/quote level. The predefined business types are:

- **Group.** Overnight stays for event participants are included with the event.
- **Local.** Overnight stays for event participants are not included with the event.

NOTE: Additional business types can be added.

Charge codes are associated with subcategories, rather than categories, and can be used for calculation and analysis purposes. When defining charge codes, the Revenue Category field is automatically populated when the Revenue Subcategory field is specified.

Additional charge codes can be defined by extending the List of Values (LOV). For more information about working with the LOV, see *Siebel Applications Administration Guide*.

This section contains the following topics, and is a step in Tax Code Administration on page 138.

1 Defining Charge Codes on page 141

2 Associating Charge Codes with Tax Codes on page 141

3 Associating Charge Codes with Service Charges on page 142

4 Reviewing Charge Codes Associated with a Revenue Category on page 142

Related Topics

- Service Charge Administration on page 136
- Tax Code Administration on page 138
- Reviewing Property-Specific Taxes and Service Charges on page 143

Defining Charge Codes

Perform the steps in the following procedure to define charge codes.

This task is a step in Charge Code Administration on page 140.

To define a charge code

1 Navigate to the Tax Service Admin screen > Charge Code List view.

2 In the Charge Codes list, create a new record, and complete the required fields.

3 In the More Info form, complete additional fields, and then save the record.

The following table describes some of the fields.

Field	Comments
Revenue Category	A group of related products. This field is automatically populated when you enter the Revenue Sub Category.
Business Type	The type of business of the customer organization. Choices are group and local.
End Date	The date the charge code becomes inactive.
General Ledger Number	An identifier that maps the charge code to the general ledger.
Revenue Subcategory	A revenue subcategory allows you to group products more precisely within a larger revenue category and assign different taxes to each revenue subcategory. For example, Appetizers can be a revenue subcategory of the revenue category Food.
Start Date	The date the charge code becomes active.

Repeat Step 2 and Step 3 for each charge code.

Associating Charge Codes with Tax Codes

Perform the steps in the following procedure to associate a charge code with a tax code.

This task is a step in Charge Code Administration on page 140.

To associate a tax with a charge code

1. Navigate to the Tax Service Admin screen > Charge Code List view.
2. In the Charge Codes list, query for and select the required charge code.
3. Click the Taxes view tab.
4. In the Taxes list, click New.
5. In the Add Taxes dialog box, select the tax you want to associate with the charge code, and click OK.
6. Save the record.

   The remaining fields are automatically populated with the property information. Repeat Step 4 and Step 5 for each service charge you want to associate with the charge code.

Associating Charge Codes with Service Charges

Perform the steps in the following procedure to associate a charge code with a service charge.

This task is a step in Charge Code Administration on page 140.

To associate a charge code with a service charge

1. Navigate to the Tax Service Admin screen > Charge Code List view.
2. In the Charge Codes list, query for and select the required charge code.
3. Click the Service Charges view tab.
4. In the Service Charges list, click New.
5. In the Add Service Charge dialog box, select the service charge you want to associate with the charge code.

   The remaining fields are automatically populated with the property information. Repeat Step 4 and Step 5 for each tax you want to associate with the charge code.

Reviewing Charge Codes Associated with a Revenue Category

After setting up all the charge codes, perform the following steps to view the charge code associations to each category using the Revenue Category Administration view.

This task is a step in Charge Code Administration on page 140.

To review charge codes associated with a revenue category

1. Navigate to the Revenue Category Administration screen > Category Admin List view.
2. In the Category Admin list, query for and select the required revenue parent category, and then click the link in the Name field.
3. Scroll down, and select the required revenue category in the Revenue Categories list.
4. Scroll down, and click the Charge Codes tab.

   The Charge Codes list displays all the charge codes associated with the revenue category record.

Reviewing Property-Specific Taxes and Service Charges

Users can view property-specific taxes and service charges after completing the procedures described in Figure 5 on page 135.

This task is a step in Charge Code Administration on page 140.

To view property-specific taxes

1. Navigate to the Property screen > Properties list view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field.
4. Click the Taxes view tab.

   The Taxes list displays all the taxes associated with the property record.

   NOTE: This is a read-only view.

To view property-specific service charges

1. Navigate to the Property screen > Properties list view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field.
4. Click the Service Charges tab.

   The Service Charges list displays all the service charges associated with the property record.

   NOTE: This is a read-only view.

11 Setting Up Pricing and Property Pricing

This chapter describes administrator procedures for setting up pricing of products and properties. It includes the following topics:

- Process of Setting Up Pricing and Property Pricing on page 145
- Pricing and Property Pricing on page 146
- Setting Up Price Lists on page 147
- Property Pricing Administration on page 148
- About the Property Pricing Profile on page 149
- Defining a Profit Series and Percentages on page 150
- Defining Future Date Adjustments on page 151
- Setting Up Special Dates on page 152
- Function Space Pricing Administration on page 153
- Using the Function Space Calendar on page 159
- Sleeping Room Pricing Administration on page 159
- Using the Sleeping Room Calendar on page 164
- Setting Up Pricing Controls for Function Spaces, Catering Products, and Sleeping Rooms on page 165
- Discount Pricing Administration on page 165
- Setting Up Full Day Discounts for Function Spaces on page 165
- Setting Up Volume Discounts on page 167
- Setting Up a Matrix Series on page 170
- Suite Pricing Administration on page 175

Process of Setting Up Pricing and Property Pricing

This topic lists the tasks typically performed by administrators when setting up pricing for products and properties. Your company may follow a different process according to its business requirements.

To set up pricing for products and properties, perform the following procedures:

1. Setting Up Price Lists on page 147
2. Property Pricing Administration on page 148
3. About the Property Pricing Profile on page 149

4 Defining a Profit Series and Percentages on page 150
5 Defining Future Date Adjustments on page 151
6 Setting Up Special Dates on page 152
7 Function Space Pricing Administration on page 153
8 Using the Function Space Calendar on page 159
9 Sleeping Room Pricing Administration on page 159
10 Using the Sleeping Room Calendar on page 164
11 Discount Pricing Administration on page 165
12 Setting Up Full Day Discounts for Function Spaces on page 165
13 Setting Up Volume Discounts on page 167
14 Setting Up a Matrix Series on page 170
15 Suite Pricing Administration on page 175

Pricing and Property Pricing

Event sales representatives and revenue managers are responsible for setting prices for products and services that are sold to individuals and groups requiring sleeping rooms, function space, and catering products at a property.

Prices quoted to customers vary by property, product type, customer, date, day or week, day part, number of nights required, and other factors. The property must establish the base prices for sleeping rooms, function space, and other ancillary products (for example, food and beverages or use of audiovisual equipment) that are sold during an event.

Event quotes that are furnished to the customer for anticipated goods and services include prices derived from a rules-based pricing system that relies on predefined data. Further negotiations with the customer results in a finalized quote (with price overrides) that is converted into an order.

Hospitality pricing administration typically consists of three processes:

- Pricing data management and pricing administration
- Opportunity, quote, and order pricing
- Revenue management and profitability analysis

Property Pricing Visibility

The users that should have access to the Property Pricing views are:

- **Property Revenue Managers.** Revenue managers of a property can only see their own rates.
- **Regional Revenue Managers.** Revenue managers of a Cluster of properties can see data for multiple properties for which they are responsible.

- **Corporate Revenue Managers.** Corporate managers are able to see data at a national level for multiple properties.

Setting Up Price Lists

An administrator can create price lists to set prices for event order line items. Each price list can specify more than one kind of pricing, for example, list price, promotional price, and so on.

Using Siebel Hospitality, price lists can be set up for use by properties. When you create a price list, it can be associated with a property and can be used to price products associated with that property. Orders are typically associated with the property's default price list.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

To create a price list

1. Navigate to the Administration - Pricing screen > Price Lists view.
2. In the Price Lists list, create a new record and enter a value in the Name field.
3. In the new record form, click the Show More button, complete the fields and save the record.

   The following table describes some of the fields.

Field	Comments
Aggregate Discount Sequence	Specify the Aggregate Discount Sequence for all the line items associated with the price list. For more information about setting up aggregate discounts, see *Siebel Pricing Administration Guide*.
Cost List	Select the cost list that you want to associate with this price list. For more information about cost lists, see *Siebel Pricing Administration Guide*.
Currency	The currency of the price list. The field is automatically populated and defaults to the currency of the application when a new price list is created.
Description	Description of the price list.
Effective From	The beginning date the price list is in effect. The current date and time is automatically populated by default when a new price list is created.
Effective To	The last date the price list is in effect. After this time, orders, line items, and so on relying on this price list cannot access data in this price list.
Name	The name of the price list.
Organization	Set this field to the property associated with the price list. **NOTE:** If you do not select a property in this field, the price list will not be associated with any property.

Field	Comments
Payment Terms	Select one default set of payment terms to be associated with this price list. This selection appears as the default data for Payment Terms when a user creates a Quote or Order using this price list. For more information about payment terms, see *Siebel Pricing Administration Guide*.
Pricing Procedure	Select a custom pricing procedure. The pricing logic in this procedure will be applied to all the line items in the price list. For more information about pricing procedures, see *Siebel Pricing Administration Guide*.

4 Select the new price list record and click the link in the Name field.

5 In the Price List Line Items list, click New and add a product to the price list.

NOTE: The following steps assume the products are already defined. If not, see Simple and Complex Products in Hospitality on page 77.

6 Add a minimum and maximum price for the price list line item in the Minimum Price and Maximum price fields.

7 Provide information in the remaining fields of the Price List Line Items list.

For descriptions of these fields, see *Siebel Pricing Administration Guide*.

Repeat Step 5 through Step 7 for each product you want to add.

For general information about price lists, see *Siebel Pricing Administration Guide*.

Property Pricing Administration

The property pricing administration business process includes all the tasks that the property revenue managers must complete to set up all the prices for their property.

The tasks necessary for property pricing administration are:

- About the Property Pricing Profile
- Defining a Profit Series and Percentages
- Defining Future Date Adjustments
- Function Space Pricing Administration
- Sleeping Room Pricing Administration
- Discount Pricing Administration
- Setting Up a Matrix Series
- Suite Pricing Administration

About the Property Pricing Profile

The revenue manager sets up the property pricing profile. The profile defines the pricing parameters for each property record. These parameters include:

- Nonparticipating Properties
- Weekend/Weekday
- Price Lists

Nonparticipating Properties Pricing

Nonparticipating properties are properties that do not use the Hospitality Event Sales Execution or Function Space Inventory processes. However, events for these properties may be sold by a member of the property brand and the National Sales Organization (NSO). Event Booking Centers sell space from and pass event opportunities to nonparticipating properties.

For a nonparticipating property, availability and pricing checks are bypassed during the generate quote process. This means that it is not necessary to perform pricing for nonparticipating properties. For more information about nonparticipating properties, see Chapter 21, "Managing Nonparticipating Properties."

Weekend and Weekday Properties Pricing

Some properties quote different rates for weekends as compared to weekdays and as a result, two different weighted average rates can be quoted to the customer. The administrator can define these properties by checking the Weekend/Weekday flag.

These properties implement business rules that price room rates for weekdays differently than room rates on the weekends because the guest profile on weekdays (typically business travelers) is different from the guest profile on the weekends (typically leisure travelers). Weekday and weekend pricing administration involves identifying the days that are priced using weekday rates, and days that are priced using weekend rates. Days defined as weekend days do not have to be consecutive, and the weekend day may include additional price adjustments on the room rate.

Associating Price Lists and Properties

Existing price lists must be associated with the properties using the Property Pricing screen.

The revenue manager typically sets up the property pricing profile, which establishes the pricing parameters for each property record.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

Creating a Property Pricing Profile

The following procedure details how to create a property pricing profile.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

To create a property pricing profile

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list query for the property required record.
3. In the property record, set the values for the pricing parameters:
   - Non Participating
   - Weekend/Weekday
   - Currency
   - Price List

Defining Weekend Prices

The property administrator can specify which days are considered to be weekdays and which are weekends for each day of the week. For example, the administrator can define Friday as a weekend day, define Saturday as a weekday, and then set Sunday as a weekend day. To define weekends and weekdays, you must select the Weekend/Weekday check box flag in the Property record.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

To define weekday and weekend days

1. Navigate to the Property Pricing Admin > Properties list.
2. In the Properties list, select the property and then click the link in the Property Name field.
3. Click the Weekend Admin view tab.
4. In the Weekend Admin list, select a weekday, and select the check box if the day is considered to be a weekend.

   If the day is not flagged as a weekend day, it is designated as a weekday.

NOTE: If you select the Weekday-Weekend check box on the property record, the weekend will be defined as Saturday and Sunday by default.

Defining a Profit Series and Percentages

The administrator or revenue manager can define a Profit Series that manages different profit percentages for different periods for each property. The Profit Percentage that is applied to an opportunity depends on the arrival day specified in the opportunity. The profit series is applied to any opportunity that falls within the start and end date of the profit series. In cases where the profit series has overlapping dates, the last date entered takes precedence.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

To define a profit series with percentages

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the property and click the link in the Property Name field.
3. Click the Profit Series view tab.
4. In the Profit Series list, create a new record.
5. In the new record enter a name, the start and end dates of the Profit Series, and a description.
6. With the Profit Series record selected, scroll down to the Profit Percentage list.
7. If you wish to populate the Profit Series list with all parent revenue categories, click Parent Revenue Category. Otherwise, click New to add individual categories.
8. Set the percentage profit to be made from each parent revenue category at the property.

Defining Future Date Adjustments

Property administrators may define future date adjustments on the pricing of revenue categories. This means at a certain date in the future, the prices of all products in a certain category will increase by the defined percentage. This markup is rolled up into each individual quote when the quote price is calculated.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

To define a future date adjustment for a category

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the property and click the link in the Property Name field.
3. Click the Future Date Adjustment view tab.
4. In the Future Date Adjustments list, create a new record.
5. In the new record, complete the fields and save the record.

   The following table describes some of the fields.

Field	Comments
Name	The name of the adjustment to be applied.
Revenue Category	The category to which the adjustment is to be applied. **NOTE:** You must select a category in this field or the adjustment will not be applied.
Revenue Parent Category	This field is automatically populated when the Revenue Category field is completed.
Start Date	The date from which the future date adjustment is to be applied.
Start Day	This field is automatically populated when the Start Date field is completed.

Field	Comments
End Date	The date on which the future date adjustment is no longer valid.
End Day	This field is automatically populated when the End Date field is completed.
% Markup	The percentage increase on all products in the category.

Setting Up Special Dates

Siebel Hospitality provides you with the ability to flag special dates that need to be acknowledged by an administrator when setting up pricing. Individual days or date ranges can be flagged as special dates. These dates may be occasions where extra function space or sleeping rooms are required for an event; they can be holidays or special events; or they could also be dates flagged with sell notes or part of a particular sales strategy.

Special date can be viewed in the Function Space Calendar and Sleeping Room Calendar. For more information, see Using the Function Space Calendar on page 159 and Using the Sleeping Room Calendar on page 164.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

To set up a special date for a property

1. Navigate to the Property Pricing Admin screen > Sell Notes list view.
2. In the Properties form, query for the required property record.
3. In the Sell Notes list, create a new record, and complete the fields.

   Some of the fields are described in the following table.

Field	Comments
Start Date	The date on which the range of special dates becomes effective.
End Date	The date from which the special date range is no longer effective.
Type	Select the type of special date. You can select one of the following: Need Function Space, Need Sleeping Rooms, Sell Notes, Holiday, Sales Strategy, and Special Events.
Created By	The User Id of the user who created this special date record.
Created Date	The date on which this special date record was created.
Last updated By	The User Id of the user who last updated this special date record.
Last Updated Date	The last date on which this special date record was updated.

Function Space Pricing Administration

An administrator or a property revenue manager can define benchmark rental fees for function space room types, and specify pricing exceptions for these functions. The administrator or manager must set up the defaults for daily rentals and then define any day part exceptions.

The user can define function space type prices at the category level, and the prices will be applied to all specific spaces associated with the category. Prices for specific space can be modified later if necessary. If categories are not defined, the administrator defines prices for specific space.

The property revenue managers must complete some setup tasks for the function space pricing of the property. These tasks include the following:

1. Setting Up Pricing Day Parts
2. Defining Function Space Pricing Rules
3. Setting Up Average Values and Function Types
4. Marking Function Spaces as Unavailable or Out Of Order

These tasks are steps in Function Space Pricing Administration on page 153.

Setting Up Pricing Day Parts

Day parts are used for rental and threshold calculations for function spaces. Either the administrator or the property revenue manager must segment the operational day into periods of time for threshold and rental calculations to work. To set up day parts for the property, see Defining Property Day Parts on page 40.

This task is a step in Function Space Pricing Administration on page 153.

Defining Function Space Pricing Rules

Function space pricing rules must be defined for each function space for quote prices to be generated. The pricing rules provide both the benchmark and threshold pricing for each day part and each day of the week. The benchmark rental price for a function space is the normal price at which the function space is rented out to a customer.

Some hospitality companies only accept function space business when an event on their properties meets a required amount of profit. This profit threshold is used to qualify an event opportunity based on the event's profit potential. Thresholds indicate how much profit needs to be made to complete the booking. The quote's aggregate function profit must be compared with the threshold defined for the function space for the indicated time period. If the quote falls below the minimum threshold, the sales representative cannot change the quote status to anything higher than prospect. Any inventory being held is released after a predefined time interval if the function status is still at Prospect.

When setting up prices for function spaces, the administrator first sets up the default rates and then creates exception pricing.

This task is a step in Function Space Pricing Administration on page 153.

Creating the Default Function Space Pricing Rules

The following procedure details how to create the default function space pricing rules.

To define the default function space pricing rules

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Function Space view tab.
4. In the Function Space list create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Function Space	Select a function space to which this rule will apply.
Start Date	The date from which this rule will apply.
Start Day	This field is automatically populated when the Start Date field is completed.
End Date	The date on which this rule will no longer apply. There is some validation on the Start and End Dates as follows: `End Date >= Start Date + 365` This means that a function space pricing rule can only run for one year at the most.
End Day	This field is automatically populated when the End Date field is completed.
Day Part	The day part for which this rule is applicable. You must create an individual rule for each day part.
Type	The type of pricing rule—that is, whether the rule is a benchmark rental rule or is a threshold rule. You must create a set of Rental rules (that is, a rental rule for each day part) and a set of Threshold rules.
Cascade	Click this check box if you want this rule to be applied to all components (or specific spaces) of category or suite functions spaces. Clicking this check box means that you will not need to create a separate rules list for each specific space associated with the category or suite. **NOTE:** This check box is only activated for Categories and Suites. It is read-only for specific spaces.

Field	Comments
Monday - Sunday	These fields represent: ■ The benchmark rental price of the function space for each day of the week or ■ The profit threshold for each day of the week If the pricing rule runs for less than one week, then it will only be possible to edit the fields for the relevant days.
Comments	Comments on the rule.

5 After you have created a pricing rule, click Apply. The Function Space Pricing Controls list is populated with the rules that you have created. Multiple rules may be applied at once by multi-selecting them and clicking Apply.

If you wish, you can make direct changes to the prices in the Pricing Controls list. These prices will take precedence over the originally created rules.

NOTE: If you make changes to the function space pricing rules in the Function Spaces list, you must click Apply after making the changes to make sure that the changes are reflected in the Pricing Controls list.

Creating Exceptions to Default Function Space Pricing Rules

Administrators may sometimes wish to define exceptions to the pricing of a function space. For example, during certain busy periods, the administrator may wish to increase the price of the function space but may want the price to go back to the benchmark rental rate after the busy period is over. An administrator can define an exception by creating a new rule that has effective start and end dates. The newly created rule will take precedence over the existing rule when the quote price is calculated.

To define exceptions to the default function space pricing rules

1 In the Function Space list, create a new record with similar values to the rule for which you wish to create an exception.

2 Set the Start Date and End Date fields, and the rental price from Monday to Sunday as appropriate.

3 Click apply. The new rule appears in the Function Space Pricing Controls list.

Setting Up Average Values and Function Types

Average values define how much a property usually receives in revenue for a function similar to the one the customer is planning on holding. Projected revenue is derived from a property's average values.

In the hospitality industry, events may be planned two or three years into the future. The customer may not have all the details for each function, but only macro-level details. Based on these macro-level details, each hotel chain can analyze the historical records to determine the average amount of money spent by the customer or the average revenue the hotel has received for similar functions.

Average values are based on the following:

- Business type
- Function type
- Date/Day

Depending on the values for these three parameters, each property can have different average values.

Function types and Business types are set up globally in the list of values (LOV) through the Administration - Data screen > List of Values list, and then every property can choose a subset of the list of values using the Property Pricing screen.

This task is a step in Function Space Pricing Administration on page 153.

To set up function types and average values

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the properties list, select the required property record, and click the link in the Property Name field.
3. Select the Function Types view tab, create a new record and complete the fields based on the function type.

   The following table describes some of the fields.

Field	Comments
Primary	Select this check box if this is the primary function type for the property.
Name	Select a name from the drop-down list.
Meal Period	Select a meal from the drop-down list if there is to be a meal during this type of function. If you select a Meal Period for this function type, the meal period is automatically chosen with the function type when a property-specific quote is generated.
Description	This field is automatically populated when the Name field is completed.
Active	Click this check box if the function type is active at this property.

4. Scroll down to the Type - Applicability Time list and create a new record.
5. Complete the following fields:
   - Business Type
   - Start Date

- End Date

NOTE: The Start Day and End Day are automatically populated with the values from Start Date and End Date.

6 Scroll down to the Average Values list.

7 If you wish to populate the Average Values list with all revenue categories, click Revenue Category. Otherwise, click New to add individual categories.

8 For each record in the average values list, update the following fields:

- Average Value
- UoM
- Service Charge or Service Charge % (These two fields are mutually exclusive—when you populate one of these fields, the other is immediately overridden.) Setup for these values is done at the property level. For more information, see Chapter 10, "Setting Up Charge Codes, Taxes, and Service Charges." However, you may specify a value here, if necessary, which will override the corresponding value for specific function type or parent revenue value.

Marking Function Spaces as Unavailable or Out Of Order

Function space is considered out of order when there is a physical issue that prevents the property from using the space. For example, if a water pipe breaks, flooding a function space, the function space is flagged as out of order for a specified period of time.

Function space is considered unavailable when the space is being used for other purposes, or the property's operations management decides that it does not make fiscal sense to have the space available for sale as function space. For example, a hotel's restaurant is open for dinner from 4 to 11 P.M. During that period, the restaurant is unavailable for sale as function space because it is being used to serve all the guests of the hotel and the local population. The restaurant's function space is designated as unavailable from 4 to 11 P.M. each day. However, the space may be available for sale at other times of the day.

Because unavailable and out-of-order function space is a revenue issue, the Property Pricing Admin screen is used. Revenue managers typically designate the function space as out of order and unavailable. When a function space is flagged as unavailable or out of order, then it cannot be included in a quote at the specified time.

This task is a step in Function Space Pricing Administration on page 153.

To flag a function space as unavailable

1 Navigate to the Property Pricing Admin screen > Properties list.

2 In the Properties list, select the required property, and click the link in the Property Name field.

3 Click the Unavailable view tab.

4 In the Unavailable list, create a new record, complete the fields, and save the record.

The following table describes some of the fields.

Field	Comments
Function Space	Select the function space that you want to flag as unavailable.
Booking Type	This field is automatically populated as Unavailable.
Frequency	Select the day on which the function space will be unavailable.
Recurr Start Date	The date from which the function space will be unavailable.
Start Day	This field is automatically populated when the Recurr Start Date field is completed.
Recurr Start Time	The time at which the function space will become unavailable.
Recurr End Date	The date from which the function space will no longer be unavailable.
End Day	This field is automatically populated when the Recurr End Date field is completed.
Recurr End Time	The time at which the function space is no longer unavailable.
Reason	Select a reason why the function space is unavailable. This list of values is administered through the Administration - Data screen > List of Values list.

To flag a function space as out of order

1 Navigate to the Property Pricing Admin screen > Properties list.

2 In the Properties list, select the required property, and click the link in the Property Name field.

3 Click the Out of Order view tab.

4 In the Out of Order list, create a new record, complete the fields, and save the record.

The following table describes some of the fields.

Field	Comments
Start Date Time	The date and time from which this function space is out of order.
Start Day	This field is automatically populated when the Start Date Time field is completed.
End Date Time	The date and time on which this function space will no longer be out of order.
End Day	This field is automatically populated when the End Date Time field is completed.

Field	Comments
Reason	Select a reason why the function space is out of order.
Function Space	Select the function space that you want to flag as unavailable.
Booking Type	This field is automatically populated as Out of Order.
Created	The date on which this record was created.
Created By	The User Id of the user who created this record.

Using the Function Space Calendar

The function space calendar can be accessed from the Property Pricing Admin screen when you drill down on a property. This calendar allows an administrator to view special dates and sell notes, function space rental by day parts, function space thresholds by day parts, and function space authorization for a particular function space at a property. This view helps the user to see all these related pieces of information for a particular function space. The administrator may find this useful when defining pricing rules. It is possible to drill down to a number of different views when using this calendar as follows:

- By drilling down on the Authorization link, the user is brought to the Inventory Control view tab for the property.
- By drilling down on the Threshold or Rental link, the user is brought to the Function Space view tab, with the particular pricing rule that affects the link in the calendar selected.
- By drilling down on Sell Notes or Special dates, the user is brought to the Sell Notes view tab with the relevant sell note or special date selected.

To use the Function Space Calendar

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property Name field, and then click the Function Space Calendar view tab. The function space calendar is displayed.
4. Select either the weekly or monthly view.
5. In the date field, select the week or month for which you would like to view details.
6. In the Function Space field, select the function space for which you would like to view details.

Sleeping Room Pricing Administration

Administrators control sleeping room pricing administration by setting up a series of pricing rules for each room. These pricing rules can be used to define benchmark rates for each of the different room types, a negotiation floor for sales representatives, minimum and maximum prices for each room type, and also costing rules for each room type. Exceptions to the established rates are typically used to adjust arrival day pricing and pricing exceptions on certain days of the week.

The pricing for different room types varies, according to the following conditions:

- Room type
- Day of the week
- Season
- Special date (overrides)

The pricing for each room type is an individual sleeping room item, or is included in a pricing matrix if matrix-based pricing is used. If a matrix is used, the benchmark room rate for the room type is defined as a line item in the matrix. For information on setting up matrix-based pricing, see "Setting Up a Matrix Series" on page 170.

Sleeping Room Pricing Administration is an important business process for the property revenue manager. The revenue manager performs a number of tasks as a part of setting up sleeping rooms. The various tasks that are performed in this process include:

1. Setting Up Rates for Sleeping Rooms
2. Defining Government Sleeping Room Pricing Rules

These tasks are steps in Process of Setting Up Pricing and Property Pricing on page 145.

Setting Up Rates for Sleeping Rooms

When setting up rates for sleeping rooms, the administrator first sets up the default rates and then creates exception pricing.

This task is a step in Sleeping Room Pricing Administration on page 159.

Creating the Default Sleeping Room Pricing Rules

The administrator defines the default sleeping room pricing types and then sets the rate for each type. The defined rates apply to the sleeping room types when the active flag is set.

To create default sleeping room pricing rules

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Sleeping Room view tab.
4. In the Sleeping Room list create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Sleeping Room	Select the sleeping room for which a rule is to be defined.
Start Date	The date from which this rule will apply.

Field	Comments
Start Day	This field is automatically populated when the Start Date field is completed.
End Date	The date on which this rule will no longer apply. There is some validation on the Start and End Dates as follows: `End Date >= Start Date + 365` This means that a function space pricing rule can only run for one year at the most.
End Day	This field is automatically populated when the End Date field is completed.
Rule Type	Select the appropriate rule type. There are six types as follows: ■ **Benchmark.** The price at which the room is generally rented. ■ **Floor (Negotiation Floor).** The variance from the benchmark room price below which a sales representative cannot negotiate prices for the room. For example, if the benchmark room price is 90 dollars, and the Floor is 20 dollars, then the sales representative cannot negotiate below a price of 70 dollars for the room. ■ **Floor %.** Indicates the percentage variance from the benchmark room price below which a sales representative cannot negotiate prices for a room. Define either a Floor rule or a Floor % rule for each sleeping room type. ■ **Minimum.** The minimum price at which a room may be rented. ■ **Maximum.** The maximum price at which a room may be rented. ■ **Cost.** Revenue Managers can define the costs associated with each sleeping room type at the property. The values entered are used to calculate the sleeping room profit, based on the event's arrival date. If the cost is defined for a date range, it is used to calculate the profit for all event opportunities scheduled to arrive within the date range. Generally, a set of rules is created for each sleeping room type.
Monday - Sunday	These fields represent the value for each day of the week for the specified rule type. If the pricing rule runs for less than one week, then it will only be possible to edit the fields for the relevant days.
Comments	Comments on the rule.

5 When you have created all the necessary pricing rules, click Apply. The Sleeping Rooms Pricing Controls list is populated with all the rules that you have created.

If you wish, you can make direct changes to the prices in the Pricing Controls list. These edited prices will take precedence over the rules originally created.

Creating Exceptions to Default Sleeping Room Pricing Rules

The administrator can define exception rates for each rule type after the rule has been created. An administrator can define an exception by creating a new rule that has effective start and end dates. The newly created rule will take precedence over the existing rule when the quote price is calculated.

To create exceptions to the default sleeping room pricing rules

1. In the Sleeping Rooms list, create a new record with similar values to the rule for which you wish to create an exception.
2. Set the Start Date and End Date fields, and the sleeping room price from Monday to Sunday as appropriate.
3. Click Apply. The new rule appears in the Sleeping Room Pricing Controls list.

Defining Government Sleeping Room Pricing Rules

The administrator can set up sleeping room pricing types and rates that meet government room rate requirements for the government market segment. These mandated rates requirements are regularly published by the U.S. government for each room type.

The prices are date-range specific and are routinely added to the system for any given property. Government pricing can be turned on and off depending on the government rate availability. While the government rate exists in the system at all times, it may or may not be available depending on the hotel's occupancy. When government pricing is not available, regular pricing is used.

The government rate cannot be offered to a group unless the government rate is open for every day that the group is resident at the property. That is, if the government rate is not available for a single day of the room block, then the whole room block cannot be offered at the government rate.

The property administrator must define the available (open) dates, and on which dates special rates for the government segment should not be applied. Government rates can vary by the arrival day of the event. For example, current government rates can be specified for a particular date range, and rates that are applicable for the next three years can also be defined.

Exceptions to sleeping room rates for the government sector usually involve defining rates for dates in the future. For example, in October, the government might release prices that are applicable beginning in January of the following year.

This task is performed as part of Sleeping Room Administration, and is a step in Sleeping Room Pricing Administration on page 159.

Setting Up Default Government Rates

The following procedure details how to set up the default government sleeping room rates.

To set up government rates

1. Navigate to the Property Pricing Admin screen > Properties list.

2 In the Properties list, select the required property.

3 In the property record, click the link in the Property Name field.

4 Click the Government Pricing view tab.

5 In the Government Rate list, create records for each sleeping room type, and complete the fields. For more information about these fields, see "To create default sleeping room pricing rules" on page 160.

6 Save the record, and click Apply.

7 Scroll down to the Government Open list, and create a new record for each sleeping room type that defines the dates on which the government rates are available.

The following table describes some of the fields.

Field	Comments
Sleeping Room	Sleeping room for which available dates are to be defined.
Start Date	The date on which the government rates become available. This date should be the same as the date defined for the sleeping room in the Government Rate list.
Start Day	This field is automatically populated when the Start Date field is completed.
End Date	The date on which the government rates are no longer available. This date should be the same as the date defined for the sleeping room in the Government Rate list. There is some validation on the Start and End Dates as follows: `End Date >= Start Date + 365` This means that a function space pricing rule can only run for one year at the most.
End Day	This field is automatically populated when the End Date field is completed.
Monday - Sunday	Click the check box for each day of the week on which the government rates are available. For example, government rates may not be available at the weekend on Saturday and Sunday nights. If the pricing rule runs for less than one week, then it will only be possible to edit the fields for the relevant days.
Comments	Comments on the rule.

8 Save the record, and click Apply. The Government Sleeping Room Pricing list displays the government rates and indicates the dates and days on which these rates apply.

Creating Exceptions to Default Government Rates

The administrator can define exception rates for each rule type after the rule has been created, and also define available dates for this exception. An administrator can define an exception by creating a new rule that has effective start and end dates. The newly created rule will take precedence over the existing rule when the quote price is calculated.

To create exceptions to the default government sleeping room pricing rules

1. In the Government Rate list, create a new record with similar values to the rule for which you wish to create an exception.
2. Set the Start Date and End Date fields, and the rental price from Monday to Sunday as appropriate. Click Apply.
3. In the Government Open list, create a new record that indicates the dates and days on which this exception is valid. Click Apply.
4. In the Government Sleeping Room Pricing list, the exception is applied to the specified dates and days.

Using the Sleeping Room Calendar

The sleeping room calendar can be accessed from the Property Pricing Admin screen when you drill down on a property. This calendar allows an administrator to view special dates and sell notes, sleeping room costs, negotiation floor, benchmark rates, government rates, sleeping room authorizations and weekday-weekend properties for a particular sleeping room at a property. This view helps the user to see all these related pieces of information for a particular sleeping room. The administrator may find this useful when defining pricing rules. It is possible to drill down to a number of different views when using this calendar as follows:

- By drilling down on the Authorization link, the user is brought to the Inventory Control view tab for the property.
- By drilling down on the Sleeping Room Cost, Negotiation Floor or Benchmark link, the user is brought to the Sleeping Room view tab, with the particular pricing rule that affects the link in the calendar selected.
- By drilling down on the Government link, the user is brought to the Government Pricing view tab, with the particular pricing rule that affects the link in the calendar selected.
- By drilling down on Sell Notes or Special dates, the user is brought to the Sell Notes view tab with the relevant sell note or special date selected.

To use the Sleeping Room Calendar

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property Name field, and then click the Sleeping Room Calendar view tab. The sleeping room calendar is displayed.
4. Select either the weekly or monthly view.
5. In the date field, select the week or month for which you would like to view details.
6. In the Sleeping Room field, select the sleeping room for which you would like to view details.

Setting Up Pricing Controls for Function Spaces, Catering Products, and Sleeping Rooms

When defining pricing for function spaces, catering products, and sleeping rooms, you may want to set a maximum and minimum price that can be charged for each item. This prevents a sales representative from undercharging or overcharging for a particular item when the quote is generated.

The minimum and maximum pricing controls for function spaces and catering products are defined when you create a price list. For more information about defining minimum and maximum prices for function spaces and catering products, see Setting Up Price Lists on page 147.

The minimum and maximum pricing controls for sleeping rooms are defined when you set up pricing for sleeping rooms. For more information about defining minimum and maximum prices for sleeping rooms, see Setting Up Rates for Sleeping Rooms on page 160.

Discount Pricing Administration

There are three types of discount pricing in Siebel Hospitality as follows:

- **Full Day Function Space Discounts.** For more information, see "Setting Up Full Day Discounts for Function Spaces" on page 165.
- **Volume Discounts.** For more information, see "Setting Up Volume Discounts" on page 167.
- **Matrix-based Discounts.** For more information, see "Setting Up a Matrix Series" on page 170.

Setting Up Full Day Discounts for Function Spaces

Administrators can define full day discounts for those customers who book functions that touch every day part for the property, or that touch every day part that is included in the full day threshold. Before full day discounts are defined, the day parts for the property must be defined. When defining the day parts, the administrator can choose to include the day part in the full day threshold. If the administrator does this, then the function must touch this day part if it is to qualify for the full day discount. If the administrator does not choose to include the day part in the full day threshold, then the function does not need to touch the day part to qualify for the full day discount.

To set up full day discounts, do the following:

- Setting Up Property Day Parts on page 166
- Defining Full Day Discounts on page 166

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

Setting Up Property Day Parts

When the administrator sets up the property day parts, it is possible to define those day parts that are part of the full day threshold. For information about setting up property day parts, see "Defining Property Day Parts" on page 40.

Defining Full Day Discounts

The following procedure details how to define full day discounts for function spaces after the property day parts have been set up.

To define full day discounts

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the FS Full Day Discount view tab.
4. In the FS Full Day Discount list, create a new record, complete the fields and save the record.

   The following table describes some of the fields.

Field	Comments
Function Space	The function space to which the full day discount will apply.
Start Date	The date from which the full day discount will become effective.
Start Day	This field is automatically populated after the Start Date field is completed.
End Date	The date after which the full day discount is no longer effective.
End Day	This field is automatically populated after the End Date field is completed.
Rule Type	Select Full Day Discount.
Cascade	Click this check box if you want this discount to be applied to all components (or specific spaces) of category or suite functions spaces. Clicking this check box means that you will not need to create a separate discount for each specific space associated with the category or suite.
Monday - Sunday	These fields represent the percentage discount on each day of the week. Enter the appropriate percentage discount for each field.
Comments	Enter relevant comments on the discount.

Example of How Full Day Discount Works

The day has been broken up into five different day parts as follows, with the day parts for full day threshold flagged:

- **Morning.** 7 A.M. until 12 P.M.

- **Afternoon.** 12 P.M. until 5 P.M. Include in Full Day Threshold flag.
- **Evening.** 5 P.M. until 10 P.M. Include in Full Day Threshold flag.
- **Midnight.** 10 P.M. until 3 A.M. Include in Full Day Threshold flag.
- **Night.** 3 A.M. until 7 A.M.

Case 1. A wedding party decides to hold an event between the hours of 12 P.M. and 12 A.M. In this case, the event touches three day parts—Afternoon, Evening, and Midnight. As the data above shows, these three day parts are the only day parts with the Include in Full Day Threshold flag selected. Therefore, the event touches all the day parts required for it to qualify for a full day discount.

Case 2. A company decides to hold a conference between the hours of 9 A.M. until 8 P.M. In this case, the event also touches three day parts—Morning, Afternoon, and Evening. However, as the data above shows, the event does not touch the Midnight day part, which has the Include in Full Day Threshold flag selected. Therefore, the event will not qualify for the full day discount as it does not touch all the required day parts.

Setting Up Volume Discounts

Administrators can set up volume discounts for customers who purchase a specified volume of a particular catering product or sleeping room. A volume discount is an adjustment to the price of a product or sleeping room based of the quantity of that product contained within the quote line or order line item, or on the quantity of sleeping rooms booked for a particular night. Volume discounts may be associated with a particular property so that all quotes from that property are subject to the same volume discount.

To set up volume discounts, do the following:

- Creating Volume Discounts on page 167
- Adding Volume Discount Line Items on page 168
- Associating Volume Discounts with a Property on page 169
- Creating Aggregate Volume Discounts for Sleeping Rooms and Suites on page 170

This task is a step in Discount Pricing Administration on page 165.

Creating Volume Discounts

Volume discounts are created through the Administration - Pricing screen. For more detailed information about how to create a volume discount, see *Siebel Pricing Administration Guide*.

This task is a step in Setting Up Volume Discounts on page 167.

To create a volume discount record

1. Navigate to the Administration - Pricing screen > Volume Discounts list.

2 In the My Volume Discounts list, create a new record, complete the fields and save the record.

Some of the fields are described in the following table.

Field	Comments
Name	Enter a name for this volume discount.
Discount Method	Select the discount method from the picklist. The options are Simple and Tiered. For more detailed information about these methods, see *Siebel Pricing Administration Guide*.
Effective From	The date from which this volume discount will become effective.
Effective To	The date on which this volume discount will become ineffective. If the volume discount will not expire, leave this field blank.
Exchange Date	If you are converting currencies, enter the date for the currency exchange rate. The system will use the exchange rate on that date to convert currency.
Description	Enter a description of the purpose of the volume discount.

Adding Volume Discount Line Items

Volume discount line items include information about quantity range and price adjustment for each quantity range for a volume discount. You must add a volume discount for each discount rate in the volume discount. For example, if you want to apply a 10 percent discount when the quantity is 5 to 10, and a 20 percent discount when the quantity is 11 or more, then you must add two volume discount line items. For more detailed information, see *Siebel Pricing Administration Guide*.

This task is a step in Setting Up Volume Discounts on page 167.

To add volume discount line items

1 Navigate to the Administration - Pricing screen > Volume Discounts list.

2 In the My Volume Discounts list, query for and select the required volume discount.

3 Click the Volume Discounts Line Items view tab.

4 In the Volume Discounts Line Items view tab, create a new record, complete the fields, and save the record.

Some of the fields are described in the following table.

Field	Comments
Name	Enter a name for the volume discount line item.
Min Qty	Enter the minimum quantity that must be purchased to take advantage of this rate.
Max Qty	Enter the maximum quantity that gets this rate.

Field	Comments
Adjustment Type	Select the type of adjustment that will apply.
Adjustment Amount	Enter the value of the adjustment. How this works will depend on the option chosen in the Adjustment Type field.

Associating Volume Discounts with a Property

The following procedure details how to associate a predefined volume discount with a property.

This task is a step in Setting Up Volume Discounts on page 167.

To associate a volume discount with a property

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Volume Discount Matrix view tab.
4. In the Volume Discount Matrix list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the discount at this property.
Description	Enter a description of the discount.
Volume Discount	Select the discount to be associated with this property.
Start Date	The date from which the volume discount will become effective.
Start Day	This field is automatically populated after the Start Date field is completed.
End Date	The date after which the volume discount is no longer effective.
End Day	This field is automatically populated after the End Date field is completed.
Product	Select a product to which the volume discount applies.
Product Line	Select a product line to which the volume discount applies. Select either a product or product line. **NOTE:** You can only specify either Product or Product Line for any Volume Discount.
Created By	The User Id of the user who created the Volume discount.
Created Date	The date on which the volume discount was created.

Creating Aggregate Volume Discounts for Sleeping Rooms and Suites

Siebel Hospitality provides you with the ability to create aggregate volume discounts for sleeping rooms when necessary. A sleeping room aggregate volume discount is a volume discount that applies to all types of sleeping rooms at a particular property. For example, there may be three different types of sleeping rooms (single room, double room, penthouse suite) at a particular property. A customer may decide to book 10 rooms of each type. So in total the customer may have booked thirty rooms. You may wish to give the customer an aggregate discount for all 30 rooms instead of giving a separate discount for each room type.

Before you carry out this procedure, you must create a volume discount, as described in Creating Volume Discounts on page 167, and you must add line items to the volume discount, as described in Adding Volume Discount Line Items on page 168.

To create an aggregate volume discount for sleeping rooms and suites

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Volume Discount Matrix view tab.
4. In the Volume Discount Matrix list, create a new record.
5. In the Product Line field, click the Select button, and in the Pick Product Line selection dialog box, select the Sleeping Room product line.
6. Complete the remaining fields, while making sure that you leave the Product field blank, and save the record. For more information on these fields, see Associating Volume Discounts with a Property on page 169.

Setting Up a Matrix Series

Using a matrix series, administrators can tailor processes and discounts to specific customer and market segments. They allow for the creation and management of prices and discounts for products in conjunction with customer and market factors.

It is recommended that you use discount matrices for discounts where there is a high volume of prices and adjustments, the discount criteria used for the adjustment are known well ahead of time, and the discount criteria used for the adjustment do not change frequently.

In Siebel Hospitality, discount matrices may be associated with accounts and market segments. For more information about discount matrices, see *Siebel Pricing Administration Guide*.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

To set up a matrix series, you must do the following:

- Creating a Matrix Series on page 171
- Do one of the following as required:

- Defining an Account Matrix Discount on page 171
- Defining a Segment Matrix Discount on page 173
- Updating All Adjustment Amounts of a Series Record on page 174

Creating a Matrix Series

The following procedure details how to create a matrix series record for which an account or segment matrix discount can be defined.

This task is a step in Setting Up a Matrix Series on page 170.

To set up a matrix series for at a property

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Matrix Series view tab.
4. In the Matrix Series list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Series Name	Enter a name for the series.
Start Date	The date from which the series will become effective.
Start Day	This field is automatically populated after the Start Date field is completed.
End Date	The date after which the series is no longer effective.
End Day	This field is automatically populated after the End Date field is completed.
Product Line	Select the product line to which this matrix series applies.
Description	Enter a description of the series.

5. You must now create either an account or statement discount for the series. For more information, see Defining an Account Matrix Discount on page 171 or Defining a Segment Matrix Discount on page 173 as appropriate.

Defining an Account Matrix Discount

Your company may wish to award discounts to valued accounts that bring a large amount of business to the company. This may act as an incentive for the account to continue using your company for its hospitality events.

This task is a step in Setting Up a Matrix Series on page 170.

To define an account matrix discount

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Matrix Series view tab.
4. In the Matrix Series list, create a new record, as described in Creating a Matrix Series on page 171.
5. Scroll down and click the Account Matrix view tab.
6. Create a number of new records as required, complete the fields, and save each record.

   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the account matrix.
Account Name	Select the account to which this matrix will apply.
Parent Account	Select the parent account of the Account to which this discount will apply.
Product	Select the product to which this matrix will apply. Only products that are contained in the Product Line for the Matrix Series will be available for selection here if a Product Line is used for the series.
Frequency	Select the day of the week on which this matrix will apply.

Field	Comments
Adjustment Type	Enter the type of adjustment. Select from one of the following: ■ **Discount Amount.** Indicates that a set amount is to be discounted from the product price. ■ **% Discount.** Indicates that a set percentage is to be discounted from the product price. ■ **Markup Amount.** Indicates that the product price is to be increased by a set amount. ■ **% Markup.** Indicates that the product price is to be increased by a set percentage. ■ **Price Override.** Indicates that the price of the product is to be overridden to the amount specified in the Adjustment Amount field. ■ **Tier Based.** Applies the discount percentage defined by each Volume Discount Line Item record to the quantity of items defined in that Volume Discount Line Item record. ■ **Multiplicative Amount.** Multiplies the target price by the specified adjustment value. ■ **Power (Target Price, Power).** Raises the target price to the specified exponential value. For example, if the target price is 4, and the adjustment value is 2, the new price will be 16 (4X4). ■ **Round (Current, Decimal Places).** Sets the number of decimal places to which the price will be rounded.
Adjustment Amount	The amount of the adjustment that is specified by type.

Defining a Segment Matrix Discount

This task is a step in Setting Up a Matrix Series on page 170.

1. Navigate to the Property Pricing Admin screen > Properties list.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Matrix Series view tab.
4. In the Matrix Series list, create a new record, as described in Creating a Matrix Series on page 171.
5. Click the Segment Matrix view tab.

6 Create a number of new records as required, complete the fields, and save the records.

The following table describes some of the fields.

Field	Comments
Name	The name of the account matrix. This field is automatically populated.
Opportunity Segment	Select the segment to which this matrix will apply.
Product	Select the product to which this matrix will apply. Only products that are contained in the Product Line for the Matrix Series will be available for selection here if a Product Line is used for the series.
Frequency	Select the day of the week on which this matrix will apply.
Adjustment Type	Enter the type of adjustment. Select from one of the following: ■ **Discount Amount.** Indicates that a set amount is to be discounted from the product price. ■ **% Discount.** Indicates that a set percentage is to be discounted from the product price. ■ **Markup Amount.** Indicates that the product price is to be increased by a set amount. ■ **% Markup.** Indicates that the product price is to be increased by a set percentage. ■ **Price Override.** Indicates that the price of the product is to be overridden to the amount specified in the Adjustment Amount field. ■ **Tier Based.** Applies the discount percentage defined by each Volume Discount Line Item record to the quantity of items defined in that Volume Discount Line Item record. ■ **Multiplicative Amount.** Multiplies the target price by the specified adjustment value. ■ **Power (Target Price, Power).** Raises the target price to the specified exponential value. For example, if the target price is 4, and the adjustment value is 2, the new price will be 16 (4X4). ■ **Round (Current, Decimal Places).** Sets the number of decimal places to which the price will be rounded.
Adjustment Amount	The amount of the adjustment that is specified by type.

Updating All Adjustment Amounts of a Series Record

On occasion, an administrator may wish to increase or decrease all the adjustment amounts associated with a matrix series. The administrator can do this using the Transform button.

To increase or decrease all adjustment amounts for a matrix series

1. Navigate to the Property Pricing Admin screen > Properties list > Matrix Series view tab for the required property record.
2. Select the required series record, and click Transform. The Matrix Transform dialog box is displayed.
3. In the Transform field, enter the amount by which the adjustment amounts should be transformed. For example, if you want to increase adjustment amounts by ten percent, enter 110%, or if you want to decrease adjustment amounts by ten percent, enter 90%.
4. Do one of the following:
   - If you want the adjustment to apply to Price Overrides only, make sure that the Price Override Only check box is selected.
   - If you want the adjustment to apply to all adjustment amounts, make sure that the Price Override Only check box is deselected.
5. Click Transform. The transformation is applied to the adjustment amount fields for Account and Segment matrices.
6. Select the matrix series and scroll down to the Price Details list.
7. In the Price details list, add a record.
8. Complete the fields and save the record.
9. Repeat Step 7 and Step 8 to create additional Price Details records.

Suite Pricing Administration

Property revenue managers need to set up suite pricing for suites that can act either as a sleeping room or a function space. The rules that govern this are as follows:

- If the suite is reserved as a sleeping room, prices are set up by specifying the rate for each day of the week according to the sleeping room pricing type, and the government sleeping room pricing type.
- If the suite is reserved as a function space, then the pricing is set up by day and day parts with the threshold and rental fee factored in. The property revenue manager creates the function space rental fee records, which are sets of rental value by day and day part. In addition, the property revenue manager sets up the thresholds by day and day part.
- If you want, you can choose to include all suites that are used as function spaces as part of the sleeping room revenue.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 145.

To include suites that are used as function spaces as part of the sleeping room revenue

1. Navigate to the Property Administration screen > Properties list view.
2. In the Properties list, query for and select the required property.

3 Click the link in the Property Name field, and then click the Suite Administration tab.

4 Select the Suite Room Rental check box.

All suites at the property that are used as function spaces are included as part of the sleeping room revenue.

Related Topics

- Function Space Pricing Administration on page 153
- Sleeping Room Pricing Administration on page 159

12 Defining Event Templates

This chapter describes how to create and manage event templates that are used in the opportunity and quote phase in Siebel Hospitality. It includes the following topics:

- About Event Templates on page 177
- Process of Creating Event Templates on page 177
- Creating a Generic Event Template on page 178
- Creating a Property Specific Event Template on page 179
- Adding a Function Agenda and Line Items on page 180
- Adding Room Block Information on page 181
- Adding Room Blocks and Line Items on page 182

About Event Templates

In the hospitality industry, there is a considerable repetition of events with similar function agendas and room blocks. On many occasions, customers may call a sales representative and say that they really like the manner in which an event was handled, and that they would like to hold a similar type of event at some stage in the future. Or, existing customers may contact a sales representative and request a similar event to one that was held previously, for example, an annual conference.

On such occasions, it is helpful to have predefined event templates that can be applied to opportunities or quotes. Applying these templates reduces the work involved with defining opportunities and quotes, while still providing the flexibility to change specific details that make an opportunity or quote specific to each customer.

There are two types of event templates that you can create for opportunities and quotes:

- **Generic Event Templates.** A generic event template is a template that can be applied to an event opportunity before a property is identified. A generic template includes generic products, generic setup styles, generic function types, and generic room block types associated with it, which allows many properties to qualify for an opportunity.
- **Property-Specific Event Templates.** A property-specific event template can be applied to an event quote when a property has been identified. A property-specific template identifies specific products available at the particular property, specific setup styles, specific function types, and specific room block types associated with the property.

Process of Creating Event Templates

This topic lists the tasks typically performed by property managers when creating event templates. Your company may follow a different process according to its business requirements.

To create event templates, perform the following procedures:

1. Creating a Generic Event Template on page 178
2. Creating a Property Specific Event Template on page 179
3. Adding a Function Agenda and Line Items on page 180
4. Adding Room Block Information on page 181
5. Adding Room Blocks and Line Items on page 182

Creating a Generic Event Template

There are two ways in which a generic event template can be created:

- Conversion of an opportunity to a generic event template. This process is described in the Opportunities chapter. For more information, see Applying an Event Template to an Opportunity on page 216.
- Creation of a new template.

The following procedure details how to create the generic template record and details the overview information required for each generic template.

This task is a step in Process of Creating Event Templates on page 177.

To create a generic event template

1. Navigate to the Event Templates screen > Generic Template list view.
2. In the Generic Template list, create a new record, click the Show More button, complete the required fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the template.
Event Template #	This number is automatically generated.
Peak # Attendees	The peak number of attendees who can attend the event.
Peak # Sleeping Rooms	The peak number of sleeping rooms for the event.
Peak # Function Spaces	The peak number of function spaces for the generic event.
Total # Nights	The total number of nights for which the rooms are blocked.
Business Type	Choose the business type in this field, that is, either Group or Local.
# of Days	The duration of the event.

Field	Comments
Accounts	Complete this field if you want the template to be specific to an account or number of accounts.
Contacts	Complete this field if you want the template to be specific to a contact or number of contacts.
Opportunity Market	Specifies whether or not the sales representative is selling within his or her assigned territory (In Market) or outside of it (Out of Market).
Opportunity Type	Means of classifying the opportunity—for example Board Meeting, Job Fair, Bar/Bat Mitzvah.
Opportunity Segment	The default is the market segment value but the value can be changed to reflect a different user segment. For example, a corporate account typically would be associated with a corporate segment. However, if the corporation holds a social function, the segmentation attributes may be different (social segment rather than corporate).
Group Type	An additional classification means for the opportunity group.
Payment Method	Select a method of payment for the event.
Discount %	The percentage discount for the event.
Created Date	The date on which the template was created.
Created By	The User Id of the user who created the template.

Creating a Property Specific Event Template

There are two ways in which a property-specific event template can be created, as follows:

- Conversion of a quote to a property-specific event template. This process is dealt with in the Quotes chapter. For more information, see Applying a Property-Specific Event Template to a Quote on page 251.
- Creation of a new template.

The following procedure describes how to create the property-specific template record and details the overview information required for each property-specific template.

This task is a step in Process of Creating Event Templates on page 177.

To create a property-specific event template

1. Navigate to the Event Templates screen > Property Specific Templates list view.

2 In the Property Specific Templates list, create a new record, click the Show More button, complete the required fields, and then save the record.

The following table describes some of the fields.

Field	Comments
Name	Enter a name for the template.
Event Template #	This number is automatically generated.
Property	Choose a property with which this template is to be associated.
Peak # Attendees	The peak number of attendees who can attend the event.
Peak # Sleeping Rooms	The peak number of sleeping rooms for the event.
Total # Nights	The total number of nights for which the rooms will be blocked.
# of Days	The duration of the event.
Accounts	Complete this field if you want the template to be specific to an account or number of accounts.
Contacts	Complete this field if you want the template to be specific to a contact or number of contacts.
Post as Name	The post as name supplied here is applied to the quote.
Payment Method	Select a method of payment for the event.
Discount %	The percentage discount for the event.
Created Date	The date on which the template was created.
Created By	The User Id of the user who created the template.

Adding a Function Agenda and Line Items

The following procedure describes how to add function agendas and line items to both generic event templates and property-specific event templates. For more information about function agendas, see "Adding a Function Agenda and Line Items to an Event Opportunity" on page 203.

This task is a step in Process of Creating Event Templates on page 177.

To add a function agenda and agenda line items to an event template

1 Navigate to the Event Templates screen and do one of the following:

- To add a function agenda and line items to a generic template, click the Generic Templates link.
- To add a function agenda and line items to a property-specific template, click the Property Specific Templates link.

2 In the list, query for and select the required template.

3 Click the link in the Name field, and then click the Functions view tab.

4 In the Functions list, create a new record and complete the fields.

Make sure that you add a Function Space and Post As Name for property-specific templates. For more information on the remaining fields, see "Adding a Function Agenda and Line Items to an Event Opportunity" on page 203.

Scroll down to Line Items, create a new record, complete the fields, and save the record.

The following table describes the fields that relate to property-specific templates only.

Field	Comments
Part #	The part number associated with the specific product.
Revenue Sub Category	Pick a revenue category with which this product is to be associated.
Revenue Category	This field is automatically populated when the Revenue Sub Category field is completed.
Parent Revenue Category	This field is automatically populated when the Revenue Sub Category field is completed.
Resource Type	This field is automatically populated when the Item field is completed.
Sequence #	This field is automatically populated when the Item field is completed.

For more information on the remainder of these fields, see "Adding a Function Agenda and Line Items to an Event Opportunity" on page 203.

Adding Room Block Information

The following procedure details how to add room block information to both generic event templates and property-specific event templates. For more information about room block information, see "Adding Room Block Information to an Event Opportunity" on page 208.

This task is a step in Process of Creating Event Templates on page 177.

To add room block information to an event template

1 Navigate to the Event Templates screen, and click the appropriate link:

- To add room block information to a generic template, click the Generic Templates link.
- To add room block information to a property-specific template, click the Property Specific Templates link.

2 In the list, query for and select the required template.

3 Click the link in the Name field, and then click the Room Block Info view tab.

4 In the Room Block Info form, complete the fields and save the records. For more information about these fields, see "Adding Room Block Information" on page 209.

Adding Room Blocks and Line Items

The following procedure details how to add room blocks and room block line items to a generic template. For more information about room blocks and line items, see "Adding Room Block Information to an Event Opportunity" on page 208.

This task is a step in Process of Creating Event Templates on page 177.

To add room block information to an event template

1 Navigate to the Event Templates screen and do one of the following:

- To add room blocks and line items to a generic template, click the Generic Templates link.
- To add room blocks and line items to a property-specific template, click the Property Specific Templates link.

2 In the list, query for and select the required template.

3 Click the link in the Name field, and then click the Room Blocks view tab.

4 In the Room Blocks list, create new records, complete the fields, and save the records.

The following table describes the fields that relate to property-specific templates only.

Field	Comments
Contact	(Optional) Associate a contact with the room block for the generic template.
Email	This field is automatically populated when the Contact field is completed.
Fax #	This field is automatically populated when the Contact field is completed.
Phone #	This field is automatically populated when the Contact field is completed.
Address	This field is automatically populated when the Contact field is completed.

For more information about these fields, see "Adding Room Blocks to an Opportunity" on page 210.

5 Scroll down to the Room Block Line Items view, create new records, complete the fields, and save the records.

For more information on these fields, see "Adding Room Blocks to an Opportunity" on page 210.

13 Post Event and Resume Templates

This chapter describes how to create post event and resume templates that are used in association with events in Siebel Hospitality. It includes the following topics:

- About Post Event and Resume Templates on page 183
- Creating Post Event and Resume Templates on page 183

About Post Event and Resume Templates

A *Post Event* is an industry-standard document that is shared among convention network hotels. The event manager gathers information from the relevant hotel departments regarding what aspects of the event worked well and what aspects need improvement. The event manager also solicits customer feedback when completing this report. The property manager provides the event planner with the Post Event report, and this report accounts for the event's actual sleeping room reservations, food and beverage functions, function-room breakdown, and activities associated with the event.

A *Resume* is a collection of all details for a single event. This report includes sleeping room information, billing arrangements and meeting requirements including food, beverages, and audiovisual equipment. The report is distributed to all hotel departments and is usually shared with the event organizer.

Before the sales representative or event manager can create these reports, the administrator must set up an assessment template in the system. This template is used to standardize reports across all properties. In Siebel Hospitality, there can only be one Post Event and one Resume template that can be used to create the reports. This restriction means that all properties for your hospitality company will have consistent reports.

Creating Post Event and Resume Templates

The following procedure details how to create Post Event and Resume templates.

NOTE: The administrator must create one of each type of template, but should not create more than one of each.

To set up Post Event and Resume templates

1. Navigate to the Administration - Data screen > Sales Assessment Templates list view.
2. In the Sales Assessment Templates list, create the appropriate type of record:
   a. Create a new record of type TNT PostEvent, and complete the remaining fields.

b Create a new record of type TNT Resume, and complete the remaining fields.

3 Enter new attributes and new attribute values in the relevant lists for each record.

For more information about sales assessment templates attributes and attribute values, see *Siebel Applications Administration Guide*.

The new attributes and attribute values appear in the Post Event and Resume reports created by the sales representative or event manager.

14 Managing Hospitality Accounts and Contacts

This chapter describes the procedures that sales managers, event managers, and sales representatives perform to create and manage event Hospitality Accounts and Contacts. It includes the following topics:

- About Hospitality Accounts and Contacts on page 185
- Scenario for Managing Accounts and Contacts on page 185
- Process of Managing Hospitality Accounts and Contacts on page 186
- Managing the Account Travel Profile on page 187
- Creating Account Event Templates on page 192
- Viewing Account Transactions on page 193
- Tracking Intermediary Accounts on page 193
- Creating an Account Business Plan on page 193
- Managing a Contact's Travel Profile on page 194
- Creating Contact Event Templates on page 195

About Hospitality Accounts and Contacts

Siebel Hospitality allows sales representatives to enter details about prospective or existing customers, intermediary accounts, competitors, and partners by using Accounts and Contacts screens and views. An account is an individual, group of people (for example, a golf club), or company with which your company has a business relationship. A contact is a person who is a member of an account with which your organization has a business relationship. An account can have many contacts, and a contact may be a member of one or more accounts.

Before you can create event opportunities, quotes, and orders, you must profile your business accounts and contacts.

This chapter provides hospitality-specific account and contact profiling. For more information about account and contact profiling, see *Siebel Applications Administration Guide*.

Scenario for Managing Accounts and Contacts

When a customer contacts a sales representative, the sales representative researches and profiles the customer's account to determine if the account and the contact are already in the database, and the status of the account.

You can use a variety of methods to verify that an account or contact exists in the system, and add the records if necessary:

- **Accounts screen.** Navigate to the Accounts screen and query for the account. If you cannot find the account, create an account record. For more information about creating and managing accounts, see *Siebel Applications Administration Guide*.
- **Contacts screen.** Navigate to the Contacts screen and query for the contact. If the contact is not found, create a contact record. For more information about creating and managing contacts, see *Siebel Applications Administration Guide*.

After accounts or contacts have been created and profiled, you can create opportunities, quotes, orders, and event checks for them. You may add further details (such as travel preferences) about them at a later stage as the details about the account or contact become available.

When you have created an account, you can manage its travel profile, create event templates for the account, view its transactions, track intermediary accounts, create business plans for the accounts, and perform basic account management, such as managing notes, attachments, and activities. When you have created a contact you can manage the contact's travel profile, create event templates for the account, build contact loyalty, and perform basic contact management, such as creating notes, attachments, and activities.

Process of Managing Hospitality Accounts and Contacts

This topic lists the tasks typically performed by sales representatives when managing accounts and contacts. Your company may follow a different process according to its business requirements.

To manage accounts and contacts, perform the following procedures:

1. Creating the Account. For more information, see *Siebel Applications Administration Guide*.
2. Profiling the Account. For more information, see *Siebel Applications Administration Guide*.
3. Managing the Account Travel Profile on page 187
4. Creating Account Event Templates on page 192
5. Viewing Account Transactions on page 193
6. Tracking Intermediary Accounts on page 193
7. Creating an Account Business Plan on page 193
8. Performing Basic Account Management. This includes managing notes, attachments and activities associated with the account. For more information, see *Siebel Applications Administration Guide*.
9. Creating the Contact. For more information, see *Siebel Applications Administration Guide*.
10. Profiling the Contact. For more information, see *Siebel Applications Administration Guide*.
11. Managing a Contact's Travel Profile on page 194
12. Creating Contact Event Templates on page 195

13 Building Contact Loyalty. For more information, see *Siebel Loyalty Administration Guide*.

14 Perform Basic Contact Management. For more information, see *Siebel Applications Administration Guide*.

NOTE: Basic Contact Management includes managing notes, attachments, and activities associated with the contact.

Figure 6 illustrates the process flow for managing hospitality accounts.

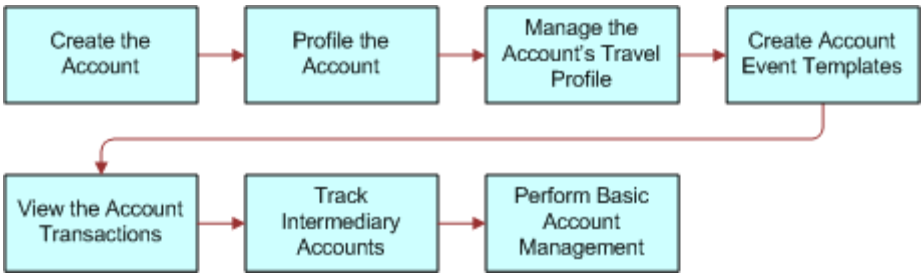


Figure 6. Business Process for Profiling Hospitality Accounts

Figure 7 illustrates the process flow for managing hospitality contacts.

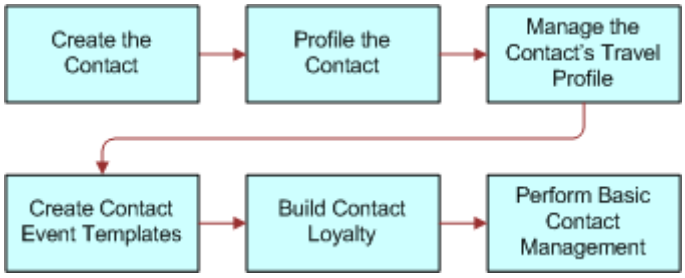


Figure 7. Business Process for Profiling Hospitality Contacts

Managing the Account Travel Profile

The travel profile in Siebel Hospitality captures information such as the total revenue for the account, the amount the account spent on entertainment, the discounts available to the account, competitors, credit card spending, and intermediary accounts. This information can be useful to a sales representative when making decisions about opportunities and determining potential revenue from a customer.

You can add a new travel profile each year to keep track of changes in the profile from year to year. For example, you could track whether the total revenue or entertainment spending for a customer changes from year to year.

This section contains the following topics, and is a step in Process of Managing Hospitality Accounts and Contacts on page 186.

■ Creating a Travel Account Profile on page 188
■ Adding a Travel Control Assessment on page 191

Creating a Travel Account Profile

Use the following procedure to create a travel profile.

This task is a step in Managing the Account Travel Profile on page 187.

To create a travel profile for an account

1. Navigate to the Accounts screen > Accounts List view.
2. In the Accounts list, query for and select the account.
3. Click the link in the Name field, and then click the Travel Profile view tab.
4. In the Profiles list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Year	The relevant year for the travel profile.
Requires LRA	Last Room Availability. If this check box is selected, the account must receive its usual rate right up until the last room at the property has been sold, regardless of hotel occupancy.
Total Potential Room Nights	The total number of room nights within one year that the company expects the account to book at your hotels.
Rooms Change Percentage	The projected percentage change in room nights booked between the current year and the previous year.
Total Potential Revenue	The total potential revenue from this account for one year. This value is calculated by multiplying the customer's rate by the total potential room nights.
Total Sales	The total sales revenue that the account expects to reach during this year.
Net Income	The net income that the account expects to make this year.
Travel & Entertainment Spend	The total amount that the account is expected to spend on travel and entertainment this year.
Rates Listed	This check box indicates whether or not there are special rates available to this account.
Rates Listed in Directory	This check box indicates whether or not special rates for a number of properties are available to the account. These rates are listed using a directory format.

Field	Comments
Extended Stay in Directory	This field indicates whether or not extended stay rates for a number of properties are defined for the account. These rates are listed using a directory format.
Account Discount	This text field indicates the discount available to this account.
Max # of Blackout Dates	Indicates the maximum number of times that the special rates can be restricted within one year.
Requirements and Requests	Records any special requirements or requests for the account.
Compelling Events and Important Issues	This field indicates key events for this account that could generate specific business opportunities.
Comments	Enter any comments about the travel profile.
Activity in Market	This text field indicates any activity in the market relevant to the company.
BT Buying Decisions	Indicates any policies that the account uses to make business transient (BT) buying decisions. For example, transient reservations may be made through a travel planner.
Reservation Method	This field indicates the reservation method for transient reservations.
Max Rate Increase/ Market	The maximum rate or increase that the account will accept according to the market and year by year.
Compliance Percentage	This field indicates the percentage of compliance per quarter for those accounts that are contracted to use a predetermined number of rooms per year.

Adding Brands to the Travel Profile

Adding brands to the travel profile allows you to indicate the property brand and travel segment preference for the account during a particular year.

To add brands to the travel profile

1. In the Profiles list, select the required travel profile.
2. Scroll down to the Brand list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Brand	Choose the account's preferred hotel brand.
Segment	Choose the travel segment that is relevant to this account.
Comments	Add comments about the brand preference.

Adding Intermediary Accounts to the Travel Profile

Intermediary accounts are accounts that create opportunities for your company for certain other accounts. You can add an intermediary account to the travel profile to indicate the companies that refer account business to your company during a particular year.

To add intermediary accounts to the travel profile

1. In the Profiles list, select the travel profile.
2. Scroll down to the Intermediary list, and create a new record.
3. Complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Account Name	Select an intermediary account from the picklist.
Street Address	This field is automatically populated when the Account Name field is completed.
City	This field is automatically populated when the Account Name field is completed.
Comments	Add any relevant comments for the intermediary account.

Adding Competitors to the Travel Profile

You can add competitors to the travel profile to list other companies that are competing for the account's business.

To add competitors to the travel profile

1. In the Profiles list, select the required travel profile.
2. Scroll down to the Competitors list, and create a new record.
3. Complete the fields, and save the record.

   The following table describes the fields.

Field	Comments
Competitor Name	The competitor's name, which is selected from a drop-down picklist.
Preferred Program	This field indicates whether or not the competitor is part of the Competitor Preferred Program.
Rate	The rate that this competitor offered to the account.
Comments	Add any relevant comments about the competitor.

Adding Credit Card Spending Details to the Travel Profile

Detailing credit card spending allows you to analyze the properties where the account spends the most using the account credit card.

To add credit card spending details to the travel profile

1. In the Profiles list, select the required travel profile.
2. Scroll down to the Credit Card Spending list, and create a new record.
3. Complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Hotel	Select a property from the drop-down list.
Hotel Spending	Enter the amount of money spent at the property by the account.
Competitive Set Spending	Enter the amount of money spent at the property's competitive set. The competitive set refers to all other properties that are in competition with your property for the account's business.
Share Percentage	The percentage spent at this property as compared to all other properties that the account uses.

Adding a Travel Control Assessment

Some accounts have one or more tools that a travel manager for that account uses to better control expenses related to travel, and to streamline the whole travel process. Travel control assessments may be used to assess these tools. This assessment may include review of communication from the account, frequency of use of company credit cards, deals with other travel vendors, and so on. For example, Online Booking Products may be important to a particular account. For each account, you may record the travel control assessments that are important to that account.

This task is a step in Managing the Account Travel Profile on page 187.

To add travel control assessments to an account

1. Navigate to the Accounts screen > Accounts List view.
2. In the Accounts list, query for and select the required account.
3. Click the link in the Name field, and then click the Travel Control Assessment view tab.
4. Create a control assessment record, select a control name value, and then click Assessment.
5. In the Control Assessments list, click Assessment, and then click Confirm to populate the entire list of control assessments.

   CAUTION: When you generate control assessment records, existing records are deleted.

6 Add a rating for each control assessment.

Creating Account Event Templates

You can create event templates that are specific to an account and then create an opportunity directly from the event template. This capability is useful if you want to create an opportunity for an account that involves an event that is similar to an event previously held.

For more information about event templates, see About Event Templates on page 177.

This task is a step in Scenario for Managing Accounts and Contacts on page 185.

To create an event template for an account

1 Navigate to the Accounts screen > Accounts List view.

2 In the Accounts list, query for and select the account.

3 Click the link in the Name field, and then click the Event Templates view tab.

4 Choose the appropriate option:

- If you want to create a generic event template for the account, click the Generic link.
- If you want to create a property-specific event template for the account, click the Property Specific link.

5 In the Event Templates list, create a new Event Template record, complete the fields, and save the record.

6 Click the link in the Name field to enter more specific details about the event template, including relevant information for room blocks and functions.

For more detailed information about creating event templates, see Process of Creating Event Templates on page 177.

To create an opportunity from an account event template

1 Navigate to the Accounts screen > Accounts List view.

2 In the Accounts list, query for and select the account.

3 Click the link in the Name field, and then click the Event Template view tab.

4 Click the Generic link.

5 In the Event Templates list, select the event template, and click Create.

6 In the Pick Event Template/Opportunity dialog box, complete the fields, and click OK.

For more information about these fields, see Applying an Event Template to an Opportunity on page 216 and Applying a Property-Specific Event Template to a Quote on page 251.

Viewing Account Transactions

Using the Accounts screen, you can view all opportunities, quotes, and orders for a particular account. The information included on these screens gives a sales representative or sales manager an indication of the volume of business and amount of revenue brought in by the account.

This task is a step in Managing the Account Travel Profile on page 187.

To view account transactions

1. Navigate to the Accounts screen > Accounts List view.
2. In the Accounts list, query for and select the account.
3. Click the appropriate view tab:
   - To view account opportunities, click the Opportunities view tab.
   - To view account quote, click the Quotes view tab.
   - To view account orders, click the Orders view tab.

Tracking Intermediary Accounts

An *intermediary account* is a company that refers account business to your company that eventually becomes a revenue-generating opportunity. For example, an intermediary account may be a travel agency. An account may approach a travel agency for assistance with booking a number of rooms in a particular region. The travel agency may then refer the account to your company, at which point you can create opportunity for the accounts.

You can review all opportunities referred to you by intermediary accounts to determine the value an intermediary account brings to your company.

This task is a step in Managing the Account Travel Profile on page 187.

To view all opportunities associated with intermediary accounts

1. Navigate to the Accounts screen > Intermediary Account view.
2. In the Intermediary Account form, query for the required account.
3. Scroll down to the Opportunities list.

   All opportunities associated with the intermediary account are displayed in the Opportunities list.

Creating an Account Business Plan

For each account, you may want to put a business plan in place in an attempt to generate revenue from future opportunities. This plan may be useful when targeting accounts for special offers and deals. Siebel Hospitality allows you to enter a short business plan for accounts over specified time periods. You can create as many business plans for the account as you require.

This task is a step in Managing the Account Travel Profile on page 187.

To create an account business plan

1. Navigate to the Accounts screen > Accounts List view.
2. In the Accounts list, query for and select the required account.
3. Click the link in the Account Name field, and then click the Business Plans view tab.
4. In the Business Plans list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the business plan.
Account	The account name, which is automatically selected.
Period	A time period to which this business plan applies.
Start Date	This field is automatically populated when the Period field is completed.
End Date	This field is automatically populated when the Period field is completed.
Type	Select the type of business plan. Options are Local, Regional, or National.
Created By	The User Id of the user who created this plan.
Team	The name of the team associated with the plan creator.
Description	Enter the details of the plan in this field.

Managing a Contact's Travel Profile

You can use the travel profile to store details about a contact's travel preferences, such as hotel preference, travel preference, and some personal preferences. This information can be valuable to a sales representative when creating an opportunity for a contact and may help to progress the opportunity.

This task is a step in Managing the Account Travel Profile on page 187.

To create a travel profile for a contact

1. Navigate to the Contacts screen > Contacts List view.
2. In the Contacts list, query for and select the contact.
3. Click the link in the Last Name field, and then click the Travel Profile view tab.

4 In the Travel Profile form, complete the fields.

The following table describes some of the fields.

Field	Comments
Preferred Hotel Chain	Select the contact's preferred hotel chain.
Preferred Brand	Select the contact's preferred brand of hotel.
Preferred Hotels	Select the contact's preferred properties.
Preferred Bed Type	Select the contact's preferred type of bed, for example, double, king size, and so on.
Smoking Preference	Select whether the contact prefers a smoking or nonsmoking room.
Preferred Paper	Select the contact's preferred newspaper.
Preferred Airline Name	Select the contact's preferred airline.
Preferred Rental Car	Select the rental company from which the contact prefers to rent a car.
Preferred Cruise Lines	Select the contact's preferred cruise lines.
Comment	Enter any relevant comments about the contact's travel preferences.

Creating Contact Event Templates

You can create event templates that are specific to a contact, and then create an opportunity directly from the event template. This information can be useful if you want to create an opportunity for a contact that was similar to an event that the contact previously booked.

For more information about event templates, see About Event Templates on page 177.

This task is a step in Scenario for Managing Accounts and Contacts on page 185.

To create an event template for a contact

1 Navigate to the Contacts screen > Contacts List view.

2 In the Contacts list, query for and select the contact.

3 Click the link in the Last Name field, and then click the Event Templates view tab.

4 Click the Generic link.

5 In the Event Templates list, create a new Event Template record, complete the fields, and save the record.

6 Click the link in the Name field to enter more specific details about the event template.

7 Enter relevant information for room blocks and functions.

For more detailed information about creating event templates, see Process of Creating Event Templates on page 177.

To create an opportunity from a contact event template

1. Navigate to the Contacts screen > Contacts List view.
2. In the Contacts list, query for and select the required contact.
3. Click the link in the Last Name field, and then click the Event Templates view tab.
4. Click the appropriate link:
   - If you want to create an opportunity from a generic event template for the contact, click the Generic link.
   - If you want to create an opportunity from a property-specific event template for the contact, click the Property Specific link.
5. In the Event Templates list, select the required event template, and click Create.
6. In the Pick Event Template/Opportunity dialog box, complete the fields, and click OK.

   For more information about these fields, see Applying an Event Template to an Opportunity on page 216 and Applying a Property-Specific Event Template to a Quote on page 251.

15 Capturing Hospitality Opportunities

This chapter describes the procedures that sales managers and event managers perform to create and add details to an event opportunity, using Siebel Hospitality software. It includes the following topics:

- Scenario for Capturing Hospitality Opportunities on page 197
- Process of Capturing Hospitality Opportunities on page 198
- Creating Hospitality Event Opportunities on page 198
- Adding a Function Agenda and Line Items to an Event Opportunity on page 203
- Adding Room Block Information to an Event Opportunity on page 208
- Selecting Properties for the Event Opportunity on page 213
- Applying an Event Template to an Opportunity on page 216
- Adding Details to the Event Opportunity on page 217
- Adding General Billing Information to an Event Opportunity on page 220
- Adding Macro Estimates to an Opportunity on page 222
- Adding an Assessment to the Event Opportunity on page 224
- Using Quick Opportunity Capture on page 224
- About Host-Affiliate Relationships on page 225
- Using the Opportunity Explorer on page 228
- Using Opportunity Charts on page 229

Scenario for Capturing Hospitality Opportunities

This scenario provides an example of a process performed by an events sales representative to create and add details to opportunities. Your company may follow a different process according to its business requirements.

A customer contacts an event sales representative at the National Sales Organization Center to discuss holding an event at a hotel property. The event customer provides some generic information about the type of functions that are contemplated and the room blocks that are needed to support the event's functions. The customer specifies some property preferences and details the payment method. In addition, the event customer wants the property to provide free transportation for event attendees from the airport to the property.

The sales representative captures this information as an opportunity and then performs an assessment of the opportunity so that each participating property can determine the value of the opportunity.

Process of Capturing Hospitality Opportunities

This section lists the tasks typically performed by hospitality sales representatives when creating an opportunity for an event. Your company may follow a different process according to its business requirements.

To create opportunities for an event, perform the following procedures:

1 Creating Hospitality Event Opportunities on page 198
2 Adding a Function Agenda and Line Items to an Event Opportunity on page 203
3 Adding Room Block Information to an Event Opportunity on page 208
4 Selecting Properties for the Event Opportunity on page 213
5 Applying an Event Template to an Opportunity on page 216
6 Adding Details to the Event Opportunity on page 217
7 Adding General Billing Information to an Event Opportunity on page 220
8 Adding Macro Estimates to an Opportunity on page 222
9 Adding an Assessment to the Event Opportunity on page 224
10 Using Quick Opportunity Capture on page 224
11 About Host-Affiliate Relationships on page 225
12 Using the Opportunity Explorer on page 228
13 Using Opportunity Charts on page 229

Creating Hospitality Event Opportunities

An opportunity can be created from a number of screens. For example, in addition to using the Opportunity screens and views, you can create opportunities from the Accounts and Contacts screens by clicking the Opportunities view tab associated with those screens.

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

To create an opportunity from the Opportunity screen

1 Navigate to the Opportunities screen.

2 From the Opportunities Home view, complete the fields in the Add form, and then click Add & Go.

3 Click the More Info view tab and complete additional fields for the opportunity.

The following table describes some of the fields.

Section	Field	Comments
Key Information	Name	The opportunity name.
	Projected Property	The property that is most likely to win the bid in the case of more than one property bids. If the property is flagged, the property is associated with the opportunity's estimated revenue when the quote is generated. You can also choose a nonparticipating property for the opportunity if you want.
	Revenue	The total rolled up amount from the projected property revenue. This is a read-only field.
	Currency	The currency that is used for the opportunity transaction.
	Business Type	Signifies whether the opportunity is group business or local. A local opportunity typically does not require sleeping rooms.
	Sales Status	When the opportunity record is created, the status is automatically set to prospect. This is a read-only field.
	Peak # Function Spaces	The number of function spaces required for this particular opportunity.
	Peak # Rooms	The number of rooms required for this particular opportunity.
Arrival Information	Arrival Date	The date and time the event begins on the property.
	# of Nights	A value can be entered, or the value can be calculated from the arrival and departure dates.
	Departure Date	The user can enter the date of departure, or it can be calculated from entries in the Arrival date and # of Days fields.
	Decision Date	The date when the customer must make a decision about the terms of the event. Managers may reference this date when developing revenue forecasts or releasing inventory.

Section	Field	Comments
Account and Contact Information	Account	The account associated with the opportunity function. A new account can be added; existing account information cannot be edited from this view.
	Intermediary Account	The intermediary account that brought the business to the property.
	First Name, Last Name	Name of the account contact. When selecting the contact, select the Primary check box if the individual is the primary contact for the event. Click the Contract check box if the contact should be included as the primary in the event contract record.
General Information	Description	A text description of the opportunity.
	Post as Name	The name that appears on the customer documents and announcement boards.
	Parking Code	The contractual terms for guest parking, which may include a parking fee or valet services.
	Sales Team	Members of the sales organization involved in the event sale. The default is the user ID of the opportunity creator.
	Opportunity #	A unique identifier for the opportunity.
Dates	Alternate Dates	The alternate dates for the event opportunity in case the desired dates cannot be booked.
	Preferred Dates	The preferred dates for the event. These dates are entered for informational purposes, until dates can be set at the function and function agenda level.
Tracking Information	Sales Status Date	Date of last status change.
	Reason Won/ Lost	The reason the opportunity was lost. Examples are Price, Relationship, Terms, Property Physical Attributes, Lost to Competition, and so on. **NOTE:** Values are only available for selection if the Sales Status is set to Lost/Turndown.
	Originating Property	The property originally requested by the customer. This field is used when the original customer request cannot be fulfilled and another property is selected.
Capacity Requirements	Total # Nights	Read-only. The total number of nights allocated to the opportunity.
	Peak # Attendees	The maximum number of attendees expected for the event.

Section	Field	Comments
Classification Information	Opportunity Type	Means of classifying the opportunity—for example, Board Meeting, Job Fair, Bar/Bat Mitzvah.
	Group Type	An additional classification means for the opportunity group.
	Opportunity Market	Specifies whether or not the sales representative is selling within his or her assigned territory (In Market) or outside of it (Out of Market).
	Opportunity Segment	The default is the market segment value but the value can be changed to reflect a different user segment. For example, a corporate account typically would be associated with a corporate segment. However, if the corporation holds a social function, the segmentation attributes may be different (social segment rather than corporate).
Influence Mechanism	External Event	Another external event that is a compelling factor for the new opportunity. An example would be a scheduled sports event in the area.
	Lead Source	The source of the opportunity. Options include Convention & Visitors Bureau, Direct Response, EBC, Field Sales, Inquiry, and so on.
Qualification Information	Opportunity Overview	An overview of the opportunity provided by the sales representative.
	Customer Needs/ Objectives	Key factors that the client must consider when selecting the property. For example, a new product launch function may have special requirements.
	Concession	Any concessions that the property may have to make—for example, if the customer requires free transportation to and from an airport.
	Competitor	The customer may mention another company that is also competing for the opportunity.
	Budget Considerations	Details the amount that the client generally spends on an event and the amount spent on the last event.
	History	Comments on the previous history of this customer.

Section	Field	Comments
Manager Information	Sales Manager	The name of the sales manager for the opportunity. The person who creates the opportunity is the sales manager for this opportunity by default, but this can be changed if necessary. When a quote is generated, the Sales Manager's name is transferred to the quote. Similarly, when the quote becomes an order, the Sales Manager's name is transferred to the order.
	Event Manager	The name of the event manager for this opportunity. When a quote is generated, the Event Manager's name is transferred to the quote. Similarly, when the quote becomes an order, the Event Manager's name is transferred to the order.
Relationship Information	Relationship Type	The type of relationship between the opportunity and other opportunities. For more information on the values available, see About Recurring Events on page 231 and About Host-Affiliate Relationships on page 225.
	Affiliate Accounts	The affiliate account for this opportunity. For more information, see About Host-Affiliate Relationships on page 225.
	Parent Opportunity	The parent opportunity.

Specifying Sleeping Room Rates for the Opportunity

When you create an opportunity, one of the fields that you must complete is the Opportunity Segment field. This field is important for determining the sleeping room costs to be applied to the opportunity. In this field, you can specify that the opportunity is part of the government segment. If you do this, government rates are applied to the sleeping room. If you do not specify a government rate, then ordinary sleeping room rates are applied to the sleeping rooms for the opportunity.

NOTE: The government rate cannot be offered to a group unless the government rate is open for every day that the group is resident at the property. That is, if the government rate is not available for a single day of the room block, then the whole room block cannot be offered at the government rate regardless of the segment with which the opportunity is associated.

To specify the sleeping room rates to be used for an opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the required opportunity.
3. Click the Show More button on the opportunity form.
4. Scroll down to the Classification Information section of the form, and in the Opportunity Segment Field, do one of the following:

- If you want government sleeping room rates to be applied to the sleeping rooms for the opportunity, select Federal Government, Government Contractor, International Government, Local Government, or State Government in this field.
- If you want regular sleeping room rates to be applied to the sleeping rooms for the opportunity, select any option other than Federal Government, Government Contractor, International Government, Local Government, or State Government in this field.

The appropriate government rate is applied to the opportunity's sleeping rooms.

Adding a Function Agenda and Line Items to an Event Opportunity

After an opportunity is created, the event sales representative can enter the proposed agenda and line item information for the opportunity using the Opportunity screen's Function Agenda view, and Agenda Line Items subview.

Because this activity occurs at the beginning of a sales stage, event sales associates typically have not yet identified the property's specific function space or catering items that need to be quoted. However, they can enter sample agenda items and subfunctions, the estimated capacity (how many individuals are planning to attend the event), and general catering requirements for each of the functions planned for the event.

This section includes the following topics and is a step in Process of Capturing Hospitality Opportunities on page 198.

- Adding a Function Agenda to an Event Opportunity on page 203
- Adding Function Agenda Line Items to an Event Opportunity on page 205
- Using Function Agenda Buttons When Defining an Opportunity Function on page 206

Adding a Function Agenda to an Event Opportunity

The Functions Agenda view includes special functionality buttons that you can use to build function hierarchies and to flag functions that are to be bypassed during the availability check. For more information, see Using Function Agenda Buttons When Defining an Opportunity Function on page 206.

This task is a step in Adding a Function Agenda and Line Items to an Event Opportunity on page 203.

To add a function agenda to an event opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the required opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.

4 In the Function Agenda list, create a new record, and complete the fields.

NOTE: Enter values in the Room Area, or Setup Style and Expected Attendees fields (or enter information in all three fields). If you specify a setup style and do not provide a value for Expected Attendees, an error occurs during the quote-generation process.

The following table describes some of the fields.

Field	Comments
Day #	The day number of the function.
Date	The date of the function.
Day	Automatically calculated, based on the date.
Function Type	The type of function that is planned. Options include Keynote Address, Lecture, Panel Discussion, Roundtable, Seminar, Workshop, Breakfast, Lunch, Dinner, Breakout, Entertainment, Exhibition, and Offsite.
Function Name	The name of the function. The default is the function type, but the name can be changed.
Start Time	The start time of the function.
Duration (mins)	The duration of the function.
End Time	The end time of the function. The user can specify a start time and an end time and the duration is automatically calculated.
Meal Period	If there is to be a meal provided with the function, select the appropriate meal period, for example, dinner, lunch, and so on.
Setup Style	The setup style for the function. Setup styles that have been defined as universally available appear in the list. For more information about setup-style, see Chapter 5, "Setting Up Function Spaces, Sleeping Rooms, and Suites," and Chapter 9, "Defining Day Parts, Status Indicators, and Setup Style Translations."
Expected Attendees	The expected number of attendees for the function, based on the customer's estimates.
Projected	The number of attendees the sales representative actually expects to attend the function. This value is used when projecting revenue.
Room Area	Function space size. The room area that the customer wants for the function space, stated in square feet. The user can change any default value that appears in this field. If the value is entered in square meters, the value is automatically converted.
Spacious Set	When this flag is selected, the expected number of attendees is multiplied by 1.5, and the result number is used in the best fit and next fit calculation. As a default, the check box is not selected. The multiplier can be changed during configuration using Siebel Tools.

Field	Comments
Flow	This flag is used to indicate to the property operations staff if the customers are arriving all at once (check box not selected) or in a flow (check box selected).
Noise	This flag is used to indicate that the function is expected to generate noise that may inconvenience other guests at the property.
Bypass	If the check box is selected, the best-fit process with availability check is bypassed.
Best Fit Suite Only	If this flag is selected, then the best-fit algorithm is only applied to function space of type suite.
Room Area (Sq. m)	The room area specified by the customer for the function in square meters. The user can specify a value either in square feet or square meters, and the other value is calculated.
Feature	Choose a Product Feature if applicable. For more information about Product Features, see *Siebel Product Administration Guide*.
Detail	Select this check box if you want to indicate that this function contains smaller subfunctions, and if the subfunctions will possibly contain smaller breakout functions (breakout functions are children of subfunctions and grandchildren of functions). Sometimes, when the function is booked by a customer, details of subfunctions and breakout functions may not be known at the time that the function is booked. If you select this check box: ■ You can create subfunctions for the function, and further break out functions for the subfunction. ■ The Day #, Date, Start Time, Duration, and End Time fields become read-only. ■ For subfunctions and breakout functions, the Date is the same as for the parent function, and the Start and End times occur within the Start and End times for the parent function.

Adding Function Agenda Line Items to an Event Opportunity

The Function Agenda line Items list provides the details such as service and products required for each function on the agenda.

This task is a step in Adding a Function Agenda and Line Items to an Event Opportunity on page 203.

To add function agenda line items to an agenda

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, select the opportunity, and click the link in the Opportunity Name field.

3 In the Function Agenda list, select the function agenda record.

4 Scroll down to the Agenda Line Items list, and add a record.

5 Complete the fields, and save the record.

The following table describes some of the fields.

Field	Comments
Item	Select the agenda line-item product name, such as coffee, soft drinks, and a table.
Product Type	This field is automatically populated with a value of Generic when the Item field is completed. This is because at the opportunity stage, only generic products can be selected. The generic products are mapped to specific products when a quote is generated.
UoM	Unit of measure for the product—for example, one gallon of coffee.
Service Start	Service start time of catered products. The default is the function start time, but the user can change this value.
Quantity	Quantity of items based on the unit of measure (UoM).
Description	A description of the function agenda line item.

Using Function Agenda Buttons When Defining an Opportunity Function

Using function agenda buttons, you can copy existing functions for an event opportunity and edit the details, as well as create a hierarchy of nested functions within functions. The Bypass button allows you to skip automatic availability checks for the selected function.

This task is a step in Adding a Function Agenda and Line Items to an Event Opportunity on page 203.

Creating a Hierarchy of Functions

You can build a hierarchy of functions and subfunctions, using the Move Up, Move Down, Indent and Outdent menu options from the Function Agenda view. For example, you might want to define a two-hour board meeting which includes a breakout session.

NOTE: For normal functions that do not have the Detail flag selected, you can only define one hierarchical level—for example: Function > Sub Function.

To create a function hierarchy

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for the opportunity.

3 In the Opportunities record, click the link in the Opportunity Name field.

4 In the Function Agenda list, add a number of related agenda records, and then complete the fields.

5 Select a subfunction record, and from the menu, choose Move Up and Move Down to position the subfunction under the primary function record.

6 From the menu, choose Indent to indent the subfunction under the primary function.

Using Copy to Create Multiple Related Functions

The Copy function speeds up the event agenda creation process by allowing the user to reuse the work completed for previous functions. If another function has many of the same characteristics as the new function, the user can duplicate a function and then edit it to reflect the new function's unique needs. For example, you can keep some of the function's line items, add new line items, and delete line items that do not apply.

The user can select multiple function records and create multiple copies of a selected function, and then associate subfunctions and line items across a selected date range.

To copy a single function

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for the opportunity record.

3 In the Opportunity record, click the link in the Opportunity Name field.

4 In the Function Agenda list, select the required function, and click Copy.

5 In the Copy Function form, complete the fields, and then click Copy.

In the Copy Function form, if you select the subfunction check box, then the subfunctions are automatically copied. If the subfunction check box is not selected, then only the function and the line items associated with the function are copied.

If you then select the Line Item check box, the line items associated with the original function are copied to the new function. By default, the subfunction and line item flags are selected, and the function is associated with the original function's opportunity. You can choose another opportunity if desired.

You can also create multiple records by selecting a value greater than 1 in the #of Copies/Day field. You can also change the function timing by changing the values in the Start From (date), Duration, Start Time or # of Days fields.

If you change the start time of the function, then the start times of all line items that are copied are also changed.

To copy multiple functions at the same time

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for and select the required opportunity record.

3 In the Opportunity record, click the link in the Opportunity Name field.

4 In the Function Agenda list, select the functions:

- To choose contiguous functions, select the first function, press SHIFT, and then select the last function to be copied.
- To choose nonadjacent functions, select the first function, press CTRL, and then select another function.

5 Click Copy, complete the fields in the Copy Function form, and then click Copy again.

6 Update the fields in the new record.

Using the Bypass Flag to Skip Availability and Pricing of Function Spaces

In the Function Agenda view, you can use Bypass to skip the availability process at the individual function level. Bypassing a function causes the following:

- The function space room rental is not determined or reserved for the function.
- The required threshold is not calculated for the function.
- The required threshold for the quote is not calculated.

If generic products have been mapped to specific products, such as specific catering items, the correct product prices appear.

Adding Room Block Information to an Event Opportunity

Entering general room block information in the Opportunity's Room Block view associates the Room Block Line Items with the opportunity. Room Block information can also be entered and refined after a quote is created for the opportunity. For more information, see "Managing Event Room Block Information in Quotes" on page 261.

This section includes the following topics and is a step in Process of Capturing Hospitality Opportunities on page 198.

- Using Rapid Room Block on page 209
- Adding Room Block Information on page 209
- Adding Room Blocks to an Opportunity on page 210
- Adding Room Block Line Items to an Opportunity on page 212
- Copying Room Block Line Items on page 212

Using Rapid Room Block

When creating an opportunity with a customer, a sales representative may want to fill out room block information without keeping the customer supplying details on the phone for a long time. A sales representative can use Rapid Room Block for fast entry of room block information.

This task is a step in Adding Room Block Information to an Event Opportunity on page 208.

To capture room block information using Rapid Room Block

1. When you have created an opportunity, click the link in the # of Nights field. The Rapid Room Blocks view tab is displayed.
2. In the Rapid Room Blocks list, create a new room block.

   For more information on how to create a new room block, see "Adding Room Blocks to an Opportunity" on page 210.
3. In the Rapid Room Blocks list, click Create.

   The Rapid Room Blocks list is automatically populated with a record for each generic room type at the property. For each room type, there is a field for each day for which the rooms are blocked. In this field, you may specify the number of rooms of that type required for that day.

   NOTE: You can only use the Create button once to create the initial record. After you have used the button to create the initial record, it becomes unavailable for use.
4. For each required room type, enter the amount of rooms to be reserved for each night of the room block, and save each record.
5. When you have entered the information for each room block using Rapid Room Block, click the Room Block view tab.

   The room block information entered using Rapid Room Block automatically appears in this view, where it can be further modified if necessary.

Adding Room Block Information

Before creating room blocks, a sales representative can add general information that applies to all room blocks. This information gives details on the percentages of room types, their price offsets, and the commission amounts applied to the room blocks.

This task is a step in Adding Room Block Information to an Event Opportunity on page 208.

To add room block information to an opportunity

1. Navigate to Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the required opportunity record.
3. In the Opportunity record, click the link in the Opportunity # field.

4 Click the Room Block Info view tab, and complete the fields in the form.

The following table describes the fields.

Field	Comments
Single %	The percentage of single rooms in the total room blocks.
Double %	The percentage of double rooms in the total room blocks.
Triple %	The percentage of triple rooms in the total room blocks.
Quadruple %	The percentage of quadruple rooms in the total room blocks.
Single Price Offset	The price offset that can be applied to single rooms.
Double Price Offset	The price offset that can be applied to double rooms.
Triple Price Offset	The price offset that can be applied to triple rooms.
Quadruple Price Offset	The price offset that can be applied to quadruple rooms.
Commission Amount	The commission amount specified for the group room block.
Commission %	The commission percent applied to the group room block. You can specify either a Commission Amount or a Commission %, but not both.
Room Notes	Special requests such as room rates and other room block details.

Adding Room Blocks to an Opportunity

A room block is a collection of room block items, and corresponds primarily to one billing item. When making a group reservation, a customer may want to specify billing methods and rates for different parts of the group. To satisfy these requirements, you can create a number of different room blocks (with a number of room block line items attached) as part of the same opportunity.

This task is a step in Adding Room Block Information to an Event Opportunity on page 208.

To add a room block to an opportunity

1 Navigate to Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for and select the required opportunity record.

3 In the Opportunity record, click the link in the Opportunity # field.

4 Click the Room Blocks view tab.

5 In the Room Blocks list, create a new record, and complete the fields.

The following table describes some of the fields.

Field	Comments
Name	The name for the room block.
Date Created	The date on which the room block was created.
Created By	The User Id of the user who created this room block.
Billing Method	Choose an appropriate method from the list.
Reservation Method	Choose the method by which the room block was reserved. The methods are: ■ **Rooming List.** A list of rooms required is sent to the property by the event organizers. ■ **Individual Reservations.** Each individual attending the event is responsible for calling the hotel to make a room reservation. ■ **Reservation Cards.** A number of reservation cards for the property were completed and sent in to the property. ■ **Housing Agency.** An intermediate agency handles the booking of the group's room blocks.
Reservation Type	Choose one of the following reservation types for the room block: ■ **GTDC**. The reservation for an individual is guaranteed for arrival by the attendees' company. No-shows are charged for the reservation. ■ **GTDI.** The reservation is guaranteed by the individual attending the event (usually by a credit card). If the reservation is not cancelled within a predefined period of time, the individual is charged for the reservation. ■ **NGTD.** The reservation for an individual is not guaranteed and the reservation is released for sale by 6 P.M. on the specified date of arrival.
Cutoff Date	The customer's deadline to reserve all of the rooms. If the customer has not reserved the rooms by this date, the revenue manager can release the space for use by other groups.
Housing Restriction	Select this check box if there is a housing restriction for this room block.
Housing Company Name	Select the housing company for this room block.
Sequence #	Defines where this room block should appear in the list of room blocks in the quote.

NOTE: In the Room Blocks list, you may only have one record with the same Room Type and Day #.

Adding Room Block Line Items to an Opportunity

The following procedure details how to add room block line items to an opportunity.

This task is a step in Adding Room Block Information to an Event Opportunity on page 208.

To add room block line items to an opportunity

1. Navigate to Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the required opportunity record.
3. In the Opportunity record, click the link in the Opportunity # field.
4. Click the Room Blocks view tab, and select the room block to which you wish to add line items.
5. Scroll down to the Room Block Line Items list, create a record and complete the fields.

   NOTE: If a room block has not yet been created, you can click New in the Room Block Line Items view to create a default room block with which the new line item is associated. Clicking this button may help to speed up data entry.

   The following table describes some of the fields.

Field	Comments
Date	Date of the room block.
Day #	Day number associated with the room block line item.
Day	Automatically calculated based upon the date. This field is read-only.
Room Type	Room types for each room block line item.
Contracted	The number of rooms for a particular room type, according to the contract.
Projected	The number of rooms for a particular room type that the sales user thinks could actually be used.
Blocked	The number of rooms for a particular room type that the sales user would actually block to account for cancellations and so on.
Complimentary	The number of complimentary rooms for each room block line item.

NOTE: At the bottom of the Room Block Line Items list, there is a Totals row, which shows the total number of room blocks from all room block line items.

Copying Room Block Line Items

Sales representatives can copy room block line items when necessary.

This task is a step in Adding Room Block Information to an Event Opportunity on page 208.

To copy room block line items

1. Navigate to the Room Block Line Items view.
2. In the Room Block Line Items list, select the room block item.
3. Click Copy.
4. Modify the values in the Copy Room Block dialog box, and then click Copy again.

Selecting Properties for the Event Opportunity

After an opportunity is created for an event, the event sales representative selects one or more appropriate properties, and then generates a quote for each property.

The customer may be interested in reserving a specific property for the event, or the customer may have general requirements that need to be met by the property. If only general attributes are specified by the customer, then the sales representative searches for a property that meets the requirements. The sales representative may use the Property Locator and the Property Screen to locate an appropriate property. If an appropriate property is identified, the sales representative can add the property to the Opportunity Properties list.

To select properties for an event, you can do the following:

- Using the Property Locator on page 213
- Using the Property Screen on page 215
- Adding a Property to an Opportunity on page 215

NOTE: If you already know the property that you want to select for the event opportunity (for example, the customer may specify a particular property), you do not need to use the Property Locator or Property screen.

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

Using the Property Locator

The Property Locator may be used to find properties in a particular region or area. The Property Locator is available from the Property screen. When you search for a property in the Property Locator, you must enter address details in the search fields. You may also enter other details about the property, such as market segment, brand, or facilities information. However, the Property Locator is primarily a tool for locating properties in a particular area or region. When you have used the Property Locator to find a list of possible properties, you can choose the appropriate property using the Properties list.

This task is a step in Selecting Properties for the Event Opportunity on page 213.

To search for properties using the property locator

1. Navigate to the Property screen > Property Locator view.
2. Enter details in the search fields, making sure that you enter information in either the City and State fields, or in the Zip Code field, and click Search.

   The following table describes some of the fields.

Field	Comments
Name	The name of the property for which you are searching.
Property Type	Select the required properties type if it is known.
CRS Code	Select the properties' Central Reservation System code if it is known.
Market Tier	Select the market segment in which the required properties are classified.
Brand	Select the brand of the required properties.
Service Level	The level of service offered by the properties.
Weekend-Weekday	Indicates whether or not weekend-weekday pricing is to be used at the required properties.
Pool	Indicates if there is a pool at the required properties.
Golf	Indicates if there are golfing facilities available at the required properties.
Beach Nearby	Indicates if there is a beach near the required properties.
City	Indicates the city in which the required properties should be located.
State	Indicates the state in which the required properties should be located.
Country	Indicates the country in which the required properties should be located.
Province	Indicates the province in which the required properties should be located.
Zip Code	Indicates the zip code for the required properties.
Distance In	Indicates if the search range should be measured in miles or kilometers.
Search Range	Indicates the maximum distance from the ZIP code or city the required properties should be located.
Business Center	Indicates if there is a business center at the required properties.
Restaurant	Indicates if there is a restaurant at the required properties.
Nearest Airport	Indicates the airport nearest to the required properties.

If there are properties matching the criteria specified, these properties are displayed in the Properties list. If there are no properties matching the criteria specified, an error message is displayed informing you to refine your search.

Using the Property Screen

When you have narrowed the list of properties to properties in a specific area, you may use the Property screen to decide on the appropriate property or properties that you wish to use for the opportunity.

This task is a step in Selecting Properties for the Event Opportunity on page 213.

To find an appropriate property using the Property screen

1. Use the Property Locator to find a list of properties in a specific area, as described in Using the Property Locator on page 213. Or, navigate to the Properties screen > Properties list, and query for properties.
2. For each property potential in the list, click the link in the Property Name field.
3. Using the view tabs, determine whether or not the property is appropriate for the opportunity in terms of facilities, sleeping room availability, neighborhood, and so on.

   If you decide that the property is appropriate for the opportunity, you may add it to the opportunity.

Adding a Property to an Opportunity

The following predictor details how to add a property to an opportunity. When the sales representative navigates to the Opportunity > Properties view, there are a number of buttons that can be used when working with properties, as follows:

- **Query.** Use this button to perform an attribute search on property records already added to the Property list. Property attributes include CRS Code, Brand, City, State, # of Guest Rooms, and so on.
- **New.** Use this button to access the Property Search list, where you can perform an attribute search for a list of properties, and then add the properties to the list.
- **Create Quote.** Use this button to create a quote for each selected property. After a quote is created, the Opportunity Quotes view appears. For more information, see Generating an Event Quote on page 246.
- **Bypass.** Bypass is both a button and a flag field. The user can manually click the field to change its value, or select multiple property records and click the Bypass button so that all selected records are flagged for bypass. The user can set the bypass flag for the property record to skip the availability check when the quote is created.

NOTE: The conversion from generic to property-specific room blocks takes place for bypassed property records, and pricing is also returned for these properties.

This task is a step in Selecting Properties for the Event Opportunity on page 213.

To add a property to an opportunity

1. Navigate to the Opportunities screen > Opportunities List view.

2. In the Opportunities list, query for and select the required opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Properties view tab.
5. In the Properties list, create a new record, and from the Add Properties list, query for properties meeting the desired criteria.
6. In the Add Properties list, select all relevant properties, and then click OK.
7. In the Properties list, select the Primary check box to designate the primary property.

Applying an Event Template to an Opportunity

After an opportunity has been created, you can apply an event template or the format of an existing opportunity to the new opportunity to define standard information about that opportunity. For example, you can apply an event template for weddings, where there are a number of standard functions and room blocks that are used for the wedding. Using event templates may reduce the amount of time it takes to create the opportunity.

When you apply an event template to an opportunity, you overwrite the existing information in the opportunity with information contained in the template. For information about creating an event template, see Chapter 12, “Defining Event Templates.”

This section includes the following topics and is a step in Process of Capturing Hospitality Opportunities on page 198.

To apply an event template to an opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity.
3. Click the menu button, and select Apply Event Template.

4 In the Pick Event Template/Opportunity dialog box, complete the fields, and click OK.

NOTE: All of the flags described in the following table are selected by default.

The following table describes some of the fields.

Field	Comments
Template/ Opportunity	Provides a list of all generic event templates and existing opportunities that can be applied as a template to the new opportunity.
Arrival Date	Specify an arrival date for the event.
Header	If you select this check box, the information contained in the More Info form of the new opportunity and the information contained in the Room Block Info view is overwritten by the information contained in the template.
Functions	If you select this check box, all functions in the template are copied to the new opportunity.
Sub Functions	If you select this check box, all subfunctions in the template are copied to the new opportunity.
Line Items	If you select this check box, all line items for functions and subfunctions in the template are copied to the new opportunity.
Room Block Line Items	If you select this check box, all sleeping room blocks in the template are copied to the new opportunity.

NOTE: Event templates may be applied to opportunities for nonparticipating properties.

Creating an Event Template from an Opportunity

If the information defined in an opportunity can be used as an event template, you can create a template from that opportunity.

To create an event template from an existing opportunity

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for and select the required opportunity.

3 Click the menu button, and select Create Generic Template.

The template appears in the Generic list in the Event Templates screen.

Adding Details to the Event Opportunity

Although an event opportunity may not have many details specified (such as the actual dates for the event and the anticipated attendance), there are other details, such as event preparation activities, and preliminary documents and notes, that you can associate with the opportunity for assessment by the event planning team.

This section includes the following topics and is a step in Process of Capturing Hospitality Opportunities on page 198.

- Modifying the Opportunity Arrival Date on page 218
- Adding Activities to an Event Opportunity on page 219
- Adding Attachments to an Event Opportunity on page 219
- Adding Notes to an Event Opportunity on page 220

Modifying the Opportunity Arrival Date

If necessary, users can change the arrival and departure date information for an event opportunity, or remove the arrival date information.

This task is a step in Adding Details to the Event Opportunity on page 217.

To modify the arrival date in an opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity form, click the calendar icon in the Arrival date field.
4. In the Enter/Change Arrival Date dialog box, select a new date, and then select a value in the Instructions field.

   The Instructions values are:

   - **Update Dates.** If the user modifies the arrival date and selects Update Dates, the dates of the room blocks and functions that are associated with the opportunity change accordingly.
   - **Update Day Numbers.** If the user modifies the arrival date and selects Update Day Numbers, the dates of the function and room block remain the same as the original. The value in the Day Number field for each function and room block record is modified to reflect the new relationship between the opportunity arrival date and the function or room block date.

   NOTE: When the arrival date is modified, the default action is to Update Dates.
5. Click OK to save changes.

To delete the arrival date in an opportunity

1. In the Opportunities list, query for the opportunity.
2. In the Opportunity form, click the select button in the Arrival Date field.
3. In the Enter/Change Arrival Date dialog box, delete the arrival date in the field, and select a value in the Instructions field.

   The Instructions values are:

- **Clear All Dates.** If the user deletes the arrival date, and then selects Clear All Dates in the Instructions field, all room block and function dates associated with the opportunity are deleted.
- **Only Clear Arrival Date.** If the user deletes the arrival date, and then selects Only Clear Arrival Date in the Instructions field, the dates and day numbers of the functions and room blocks remain unchanged.

NOTE: When the arrival date is modified, the default action is to Clear All Dates.

4 Click OK to save the modification.

Adding Activities to an Event Opportunity

You can associate activities with the opportunity record using the Activities view. For more information about activities, see *Siebel Applications Administration Guide*.

This task is a step in Adding Details to the Event Opportunity on page 217.

To associate activities with an event opportunity

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for and select the opportunity.

3 In the Opportunity record, click the link in the Opportunity Name field.

4 Click the Activities view tab.

5 In the Activities list, add a record, and complete the fields.

Repeat this step for each activity.

Adding Attachments to an Event Opportunity

As part of creating a history of event details, sales representatives and event managers may want to attach files such as contracts or maps of exhibition displays to the opportunity. The Attachments list for Siebel Hospitality uses standard Siebel fields and procedures for attachments. For more information about attachments, see *Fundamentals*.

This task is a step in Adding Details to the Event Opportunity on page 217.

To add attachments to the Event Opportunity

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for and select the opportunity.

3 In the Opportunity record, click the link in the Opportunity Name field.

4 Click the Attachments view tab.

5 In the Attachments list, click either New File or New URL.

6 Associate the file with the opportunity record.

To view an opportunity attachment file

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for the opportunity.

3 In the Opportunity record, click the link in the Opportunity Name field.

4 Click the Attachments view tab.

5 In the Attachments list, select the attachment record, and click the link in the Name field.

6 From the File Download dialog box, choose one of the following alternatives, and then click OK.

The alternatives are:

- Open this file from its current location
- Save this file to disk

Adding Notes to an Event Opportunity

Sales team members can add text notes to the opportunity, using the Notes view. Notes can be designated as private (accessible only by the creator) or public (accessible by the entire events planning team).

This task is a step in Adding Details to the Event Opportunity on page 217.

To add notes to an opportunity

1 Navigate to the Opportunities screen > Opportunities List view.

2 In the Opportunities list, query for and select the opportunity.

3 In the Opportunity record, click the link in the Opportunity Name field.

4 Click the Notes view tab, and then click the Public Notes or Private Notes link.

5 In the Notes list, add a record, and, in the Description field, add the note text.

6 Click Check Spelling to verify spelling in the field.

Adding General Billing Information to an Event Opportunity

In the Opportunity Billing Information view, the sales representative can enter information about an account that is different from the primary account that is used for event billing purposes. This view is also used to enter related information such as the deposit fee for a particular property, cancellation fee, tax exemptions, and so on.

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

To add event billing information to an opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity record.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Billing Information view tab, and complete the fields in the form.

   The following table describes some of the fields.

Field	Comments
Account	The account associated with the billing. For more information, see How Bill To Information Is Used in the Event Sales Process on page 222.
Contact	The primary person associated with the account.
Cancel Fee Amount	The amount applied if there is a cancellation. Enter a value in this field or the Cancel Fee % field.
Cancel Fee %	The percentage amount that is applied if a cancellation occurs. Enter a value in this field or in the Cancel Fee Amount field.
Deposit Amount	Sum of money used to secure the event. Click the select button to complete the Amount Received, Deposit Due, and Deposit Date.
Amount Received	The amount of the deposit received.
Deposit Due	The date on which the deposit is due.
Deposit Date	The date on which the deposit is received. This value is automatically populated when the Deposit received flag is set.
Deposit Received	A check box flag that when selected indicates the deposit has been received.
Tax Exempt	If the check box is selected, it indicates tax exempt status for the account selected in the Account field.
Tax Exempt Approved	If selected, it indicates the tax exempt status is approved for the event.
County Tax Exempt #	County Tax Exempt number.
City Tax Exempt #	The City Tax Exempt number.
State Tax Exempt #	State Tax Exempt number.
County Applicable	The county for which taxes are exempt.
City Applicable	The applicable city for taxation.
State Applicable	Indicates the applicable state for taxation.

How Bill To Information Is Used in the Event Sales Process

The Bill To information is automatically transferred to the quote and may be used during other stages of the event planning. When an order is created for an event, its Bill To information defaults to the event's Bill To information. The user can manually change the information if, for example, a function is billed to a different company, or the contact for a bill changes. Bill To information is also referenced when generating an Event Check.

Managing Event Deposits Using the Opportunity Bill To Form

During the event sales process, the customer may be required to pay one or more deposits that are applied to the event's final cost. For example, the deposit might include $750 due with the signed contract, the contracted deposit might be payable at the time of a signed agreement, with 50 percent of the estimated balance due 30 days before the event, and the balance due 72 hours before the event.

In a typical scenario, the sales representative records the amount of the deposit, and when it is due. When the customer remits the first deposit payment, the sales representative records the amount received, the date it is received, and completes the turnover process to Event Management. As additional deposit funds are remitted by the customer, the Event Manager revisits the Billing Information view, records the latest deposit, and the date received. This process continues until all of the deposits are received. The last deposit recorded appears in the Billing Information form field.

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

To record multiple deposits for an event

1. Navigate to the Opportunities screen > Opportunities List view.
2. From the Opportunities list, query for and select the opportunity record.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. From the Opportunity form, click the Billing Information view tab.
5. In the Deposit Information section, click the select button in the Deposit Amount field.
6. From the Deposit dialog box, create a new record, complete the fields, and click Save.

Repeat this procedure to record each deposit payment.

Adding Macro Estimates to an Opportunity

At an early stage in the process of making a sale, a sales representative typically tries to find out how much the customer is willing to spend for the full event and also how much the customer is willing to spend for each day during the event. The sales representative can either estimate the amount from previous experience or can talk to the customer to get approximate values. Estimates are based on the expected revenue and number of attendees for a particular revenue category.

The information entered at the opportunity stage is passed to the quote when it is generated. The Macro Estimates are relevant until more detail becomes available either from average values or actual line items. However, if these details do not become available, it is possible for the sales representative to use the macro estimates instead of revenue estimates for the quote.

Macro estimates can be added for both participating and nonparticipating properties.

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

To add macro estimates to an opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Macro Estimates view tab.
5. Perform whichever of the following tasks is appropriate for your needs:
   - To add all revenue categories to the Macro Estimates list, click Populate.
   - To add a specific category to the Macro Estimates list, create a new record, and select a revenue category in the Revenue Category field.

     The Parent Revenue Categories for each Revenue Category is populated to the Parent Revenue Category field.
6. Enter a Total Revenue estimate for the opportunity, and an estimate for the Total Expected Employees.

   The Total Revenue - Per Person is automatically calculated when these two fields are completed.
7. When you are satisfied with the Total Revenue and Total Expected Employees values, click Allocate.

   The day estimates for the category are generated and displayed in the Day Estimates list. The number of days for each opportunity is equal to the number of nights plus one day, because, for example, an opportunity that is booked for four nights spans five days in total.

   The following two fields are automatically populated:
   - **Calculated Average Check.** The average cost to be spent on the selected category on each day of the opportunity. This field is calculated as follows:

     Total Revenue / (# of Nights + 1)

     NOTE: This figure is rounded to the nearest unit of currency.
   - **Calculated Total Revenue.** The sum of the average costs for each day of the opportunity. This field is calculated as follows:

     Calculated Total Revenue = Sum of all Day Estimates Revenue field
8. (Optional) Scroll down to the Day Estimates list to make any desired changes to the existing estimates.

   The values are rolled up to the macro estimate for the revenue category.

Adding an Assessment to the Event Opportunity

The sales associate can use the Assessment view to perform an assessment of the opportunity so that each participating property can view the value of the opportunity.

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

To add an assessment to an opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Assessments view tab.
5. In the Assessments list, create a new record.
6. In the new record, select a predefined assessment template from the list in the Template Name field.

   For more information about creating assessment templates with predefined attributes, see *Siebel Applications Administration Guide*.
7. Scroll down to the Assessment Attributes list, and then rate each attribute by completing the Value field for each attribute in the list.

   The scores are automatically calculated and appear in the Assessment Score and Percentage fields in the Assessment record.
8. (Optional) In the Assessment record, change the Assessment Name.

Using Quick Opportunity Capture

Sales users can capture high-level information about an event opportunity using the Opportunity Capture view.

The Capture view helps the user specify the following opportunity information from one location:

- Property information
- Macro Revenue Estimates
- Function Agenda information
- Room Block information

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

To capture property information

1. Navigate to the Opportunities screen > Opportunities List view.

2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Capture view tab.
5. In the Prop list, create a new record, select the property, and complete the fields.
6. In the Macro Est list, create a new record, select a category, and complete the fields.
7. Scroll down to the RB list, and click Create to create a new Room Block:
   a. In the Room Block dialog box, create a new record and complete the fields.
   b. For each of the required room types, enter the amount of rooms required for each night.

   NOTE: You can only create room blocks line items from this list if you have not already created room blocks. The Create button is not available if you have already created room blocks.

   You can click the link in the Rooms field to navigate to the Opportunity Room Blocks view.
8. In the Functions list, create a new agenda record, and complete the fields.
   - Click Copy if you want to duplicate and modify existing agenda items.
   - Click the link in the Day # field to navigate to the Opportunity Function Agenda view.

About Host-Affiliate Relationships

A Host-Affiliate relationship for opportunities is a relationship where one company (the host) handles an entire event and then other companies (the affiliates) do individual parts of the event. For example, a company such as Microsoft may decide to host an event at a property, and may ask IBM to take part in one of the events. In general, the host would take care of the following things:

- The host determines the affiliates for the functions.
- The host books function space and hotel rooms and then allocates the space and rooms to the affiliates.
- The host books all inventory and later distributes this inventory to the affiliates.
- The host negotiates a deal with the hotel chain to get a special rate, which may not be extended to the affiliates.

Host opportunities are represented by one parent opportunity. All affiliate opportunities associated with this opportunity are created as subopportunities to the host opportunity. Host opportunities-affiliate opportunities can be associated with nonparticipating properties.

NOTE: For host-affiliate opportunities, allocation of inventory must be done manually by the sales representative. This means that inventory is not automatically mapped to property-specific inventory during the generate quote process. For more information about adding inventory to opportunities at the quote stage, see Chapter 18, “Working with Inventory.”

This section includes the following topics and is a step in Process of Capturing Hospitality Opportunities on page 198.

- Creating the Host Opportunity on page 226

- Associating Affiliate Accounts with the Host Opportunity on page 226
- Creating the Affiliate Opportunity on page 227

Creating the Host Opportunity

The host opportunity is created from the Opportunities list in the same manner as other opportunities.

This task is a step in About Host-Affiliate Relationships on page 225.

To create a host opportunity

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, create a new record, and set the record's Relationship Type field to Host.
3. Complete the remaining fields, and then save the record.

   For more information on these fields, see Creating Hospitality Event Opportunities on page 198.

Associating Affiliate Accounts with the Host Opportunity

Affiliate accounts are added using the Affiliate Accounts view. From this view, you can specify the affiliate accounts, contacts, and other information associated with the opportunity.

This task is a step in About Host-Affiliate Relationships on page 225.

To associate an affiliate account with an opportunity

1. Create a host opportunity, as described in Creating the Host Opportunity.
2. Click the link in the Opportunity Name field, and then click the Affiliate Accounts view tab.
3. In the Affiliate Accounts list, create a new record, complete the fields, and then save the record.

   The following table describes some of the fields.

Field	Comments
Primary	Select this check box if the account is the primary affiliate account for the opportunity.
Account	Select an account to be affiliated with the opportunity from the drop-down list.
Last Name	Select a contact from the drop-down list.
First Name	This field is automatically populated when the Last Name field is completed.
Status	Select the status of the affiliate.

Field	Comments
Role	Select the role of the affiliate account.
Code	Enter a code for the affiliate if necessary.
Peak # Attendees	The peak number of affiliate attendees.
Rate	Enter details of the rate at which sleeping rooms and functions spaces can be offered.
Function Space Requirement	Enter details about function space requirements for the affiliate.
Sleeping Room Requirement	Enter details about sleeping room requirements for the affiliate.
Work Phone #	This field is automatically populated when the Last Name field is completed.

Creating the Affiliate Opportunity

When you have created the host opportunity, and added affiliate accounts, you may then create affiliate opportunities.

This task is a step in About Host-Affiliate Relationships on page 225.

To create affiliate opportunities

1. Create an opportunity as described in "Creating the Host Opportunity" on page 226.
2. Click the link in the Name field, and then click the Affiliate Opportunities view tab.
3. In the Affiliate Opportunities list, create a new record, complete the fields, and save the record.

   For more information about these fields, see Creating Hospitality Event Opportunities on page 198.
4. Scroll down to the Room Block Items list, and create new records as necessary.

   For more information about Room Blocks, see "Adding Room Block Information to an Event Opportunity" on page 208.
5. In the Agenda Functions list, create new records as necessary.

   For more information about Function Agendas, see "Adding a Function Agenda and Line Items to an Event Opportunity" on page 203.

NOTE: You cannot add a property to affiliate opportunities. The property can only be added at the host level. For more information, see "Creating the Host Opportunity" on page 226.

Using the Opportunity Explorer

The Opportunity Explorer can be used to view details about all opportunities in the system. However, it may be especially useful when dealing with recurring events and host-affiliate opportunities. The Opportunity Explorer allows you to view details about an opportunity by selecting the opportunity in an explorer window and then using the folders in the explorer window to view the details.

Figure 8 shows the Opportunity Explorer window with a hierarchical list of subopportunities contacts, products, partners, quotes, activities, and notes associated with a particular opportunity. Each opportunity subfolder provides a list of relevant records, and the user can drill down to a particular record for more details.

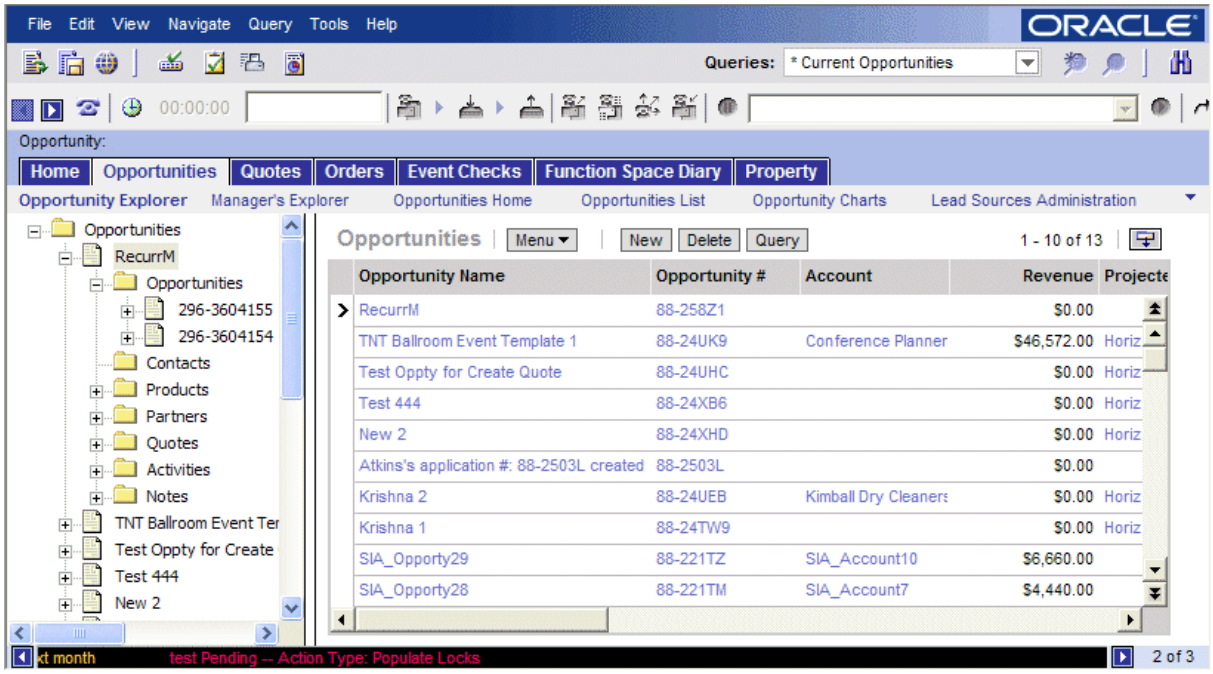


Figure 8. Opportunity Explorer Window

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

To use the opportunity explorer

1. Navigate to the Opportunities screen > Opportunity Explorer view.
2. In the Opportunities list, query for and select the opportunity record in the Explorer pane on the left side of the screen.
3. Use the opportunity subfolders to review the opportunity details.

Using Opportunity Charts

You can analyze opportunities using a variety of different chart formats including pie charts and bar charts. Opportunities at all stages can be viewed as charts. This includes definite, lost/turndown, canceled, T1/T2, prospect, actualized, recurring and host/affiliate opportunities.

This task is a step in Process of Capturing Hospitality Opportunities on page 198.

To display charts that analyze opportunities

1. Navigate to the Opportunities Screen > Opportunities List view.
2. In the Opportunities list, query for the opportunities that you want to analyze in a chart.
3. Click the Opportunity Charts link.
4. In the Select Chart drop-down list, select the chart type that you want to view.
5. In the Chart Format drop-down list, select the format in which you want to view the analysis.

   The chart appears in the format that you selected.

16 Managing Recurring Events

This chapter describes the procedures that sales managers and event managers perform to create and add details to a recurring event, using Siebel Hospitality software. It includes the following topics:

- About Recurring Events on page 231
- Process of Creating Recurring Events on page 232
- Creating Recurring Events on page 232
- Creating the Recurring Opportunity on page 232
- Creating Subopportunities on page 233
- Setting the Recurrence Details on page 234
- Generating Quotes for Recurring Events on page 235
- Generating Subopportunity Quotes on page 235
- Compiling Aggregate Quotes on page 236
- Compiling What-If Aggregate Quotes on page 237
- Completing an Aggregate Quote Evaluation on page 237
- Performing a Price Override for Room Blocks Associated with an Aggregate Quote on page 238
- Changing the Projected Property on page 239
- Submitting an Aggregate Quote for Evaluation on page 239

About Recurring Events

Recurring events are a repeating series of events that take place at specified time intervals, but that are associated with only one opportunity. For example, a meeting that is held every month for a year, or a room block for an airline crew, are recurring events. There are two types of recurring events in Siebel Hospitality as follows:

- **Ordinary Recurring Events.** These are repeating events that take place at a given property at regular time intervals, for example, a meeting on the first Monday of every month at a specific property.
- **Circular Tours.** These are repeating events that take place at different properties in the company's chain of properties.

Recurring events can be created for both participating and nonparticipating properties.

Process of Creating Recurring Events

This topic lists the tasks typically performed by sales representatives when managing recurring events. Your company may follow a different process according to its business requirements.

To manage recurring events, perform the following procedures:

- Creating Recurring Events on page 232
- Creating the Recurring Opportunity on page 232
- Creating Subopportunities on page 233
- Setting the Recurrence Details on page 234
- Generating Quotes for Recurring Events on page 235
- Generating Subopportunity Quotes on page 235
- Compiling Aggregate Quotes on page 236
- Compiling What-If Aggregate Quotes on page 237
- Completing an Aggregate Quote Evaluation on page 237
- Performing a Price Override for Room Blocks Associated with an Aggregate Quote on page 238
- Changing the Projected Property on page 239
- Submitting an Aggregate Quote for Evaluation on page 239

Creating Recurring Events

Recurring events are created in much the same manner as ordinary opportunities. The recurring series of events is represented by one parent opportunity. However, because each event in the series takes place at a different time than other events, the opportunity is divided into a number of subopportunities that represent each individual event.

This section includes the following topics and is a step in Process of Creating Recurring Events on page 232.

- Creating the Recurring Opportunity on page 232
- Creating Subopportunities on page 233
- Setting the Recurrence Details on page 234

Creating the Recurring Opportunity

The recurring event is created in the Opportunities List in the same manner as other opportunities.

This task is a step in Creating Recurring Events on page 232.

To create a recurring event

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, create a new record, and select Recurring for the record's Relationship Type.
3. Complete the remaining fields, and save the record.

   For more information on these fields, see Creating Hospitality Event Opportunities on page 198.

NOTE: When you create a recurring opportunity, you cannot select a Property, create a function agenda or create a room block for the opportunity. However, you can do this for the opportunity's subopportunities. Also, it is not possible to generate a quote for the opportunity. Instead, quotes must be generated for its subopportunities.

Creating Subopportunities

After the recurring event opportunity has been created, a number of subopportunities that represent each individual event in the series of events should be created.

When you have created the subopportunities, you may provide more detailed information, for example, notes, activities, contact information, and so on, about these opportunities. For more information, see Chapter 15, "Capturing Hospitality Opportunities."

This task is a step in Process of Creating Recurring Events on page 232.

To create subopportunities

1. Create an opportunity as described in Creating the Recurring Opportunity on page 232.
2. Click the link in the Name field, and then click the Sub Opportunities view tab.
3. In the Sub Opportunities list, create a new record.

   The Name, Opportunity #, Arrival Date, Sales Stage, and Relationship type fields are automatically populated.
4. Change the Name, Arrival Date, # of Nights, and Projected Property fields as required.
5. Scroll down to the Room Block Items list, and create new records as necessary.

   NOTE: From this list, you can create both room blocks and line items. By entering information to the Room Blocks field, you are in effect creating a Room Block. The information entered in the remainder of the fields is used to create a line item for the room block. If you want to view the standard layout for Room Blocks, simply click the link in the Name field of the subopportunity, and then click the Room Blocks tab. You can enter information to this view if you want.

   For more information about Room Blocks, see Adding Room Block Information to an Event Opportunity on page 208.

6 In the Agenda Functions list, create new records as necessary.

For more information about Function Agendas, see Adding a Function Agenda and Line Items to an Event Opportunity on page 203.

NOTE: You can apply event templates to a subopportunity from the Sub Opportunity list Menu. For more information about applying event templates, see Applying an Event Template to an Opportunity on page 216.

Setting the Recurrence Details

When you have created a subopportunity that contains Room Block Info, Room Block Items, and a Function Agenda, you may set the recurrence for this subopportunity. By setting the recurrence, all the individual events in the series are created in the Sub Opportunities list.

This task is a step in Process of Creating Recurring Events on page 232.

To set the recurrence details

1 Create a subopportunity as described in Creating Subopportunities on page 233.

2 In the Sub Opportunities list, select the subopportunity, and click Recurrence.

The Recurrence view appears.

3 In the drop-down list, select how often the event is to occur.

4 Available options are Daily, Weekly, Monthly, or Yearly.

5 In the Recurrence Pattern form, fill in the appropriate recurrence pattern details.

NOTE: If you choose a yearly recurrence, you also need to specify either By Date Information or By Day, Week #, and Month. Select either the By Date or By Day, Week #, and Month check box, and complete the necessary fields.

6 In the Range of Recurrence form, fill in the Arrival Date, and whether you want the recurring events to end by Date or by Occurrence:

- If you decide to end the recurring events by Date, then you must specify the date on which the series of events ends.
- If you decide to end the recurring Events by Occurrence, then you must specify the number of recurring events that are in the series of events.

7 Click OK.

The new recurring opportunities are populated to the Sub Opportunities list. The name of each recurring opportunity is automatically populated with a number. Each of these numbers are part of a continuing series. For example, if three recurring opportunities have been created, the names of the opportunities may be as follows: 296-41527311, 296-41527312 and 296-41527313.

Generating Quotes for Recurring Events

Quotes cannot be generated from parent recurring opportunities. Quotes can be generated, however, for individual events in a series of recurring events from the Sub Opportunities view.

After all the individual quotes are generated, you can create an aggregate quote for the parent recurring opportunity. The aggregate quote, which is compiled from the Aggregate Quotes view, provides revenue and other details for an entire set of subquotes. The aggregate quote is compiled from all projected properties, and as the name suggests, it aggregates totals from all quotes regardless of the property where the events are to take place.

Quotes may be generated for a number of different properties before customers decide which property is most suitable to their needs. When bidding competitively against other properties for an opportunity, it may be necessary for a sales representative from a particular property to see an aggregate quote for a recurring event if the entire recurring event were to take place at the sales representative's property. These types of quotes are called What-If Aggregate Quotes and may be generated by a sales representative when necessary. When you generate a What-If Aggregate quote, the projected property for each quote does not change.

This section contains the following topics, and is a step in Process of Creating Recurring Events on page 232.

- Generating Subopportunity Quotes on page 235
- Compiling Aggregate Quotes on page 236
- Compiling What-If Aggregate Quotes on page 237

Generating Subopportunity Quotes

Subopportunity quotes must be generated before aggregate quotes can be compiled. The subopportunity quotes may be modified after they have been generated.

When you have generated a subopportunity quote, you may provide more details about the quote, for example, revenue estimates, macro estimates, function agenda, room block information, and so on, about these quotes. For more information, see Chapter 17, "Managing Property-Specific Event Quotes."

This task is a step in Process of Creating Recurring Events on page 232.

To generate quotes for recurring events

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Sub Opportunities view tab, and in the Sub Opportunities list, select the opportunity for which you want to generate a quote.

   NOTE: If you want, you can select multiple opportunities in the list, and then generate the quotes for all opportunities at once.

5 Click Create Quote.

One or more quotes are created, and the Sub Opportunity Quotes view is displayed, showing the property and quote associated with the subopportunity.

NOTE: You can add other properties to the list of properties and generate quotes for these properties also.

Compiling Aggregate Quotes

An *aggregate quote* is one that provides summary details of all subopportunity details for the recurring event. When an aggregate quote is complied in the Aggregate Quotes view, the aggregate property quotes for that aggregate quote, and related quotes for the aggregate property quotes are also displayed in the Aggregate Quote view.

Before an aggregate quote can be compiled, subopportunity quotes for the recurring event must be generated.

When you compile an aggregate quote, the following things may occur:

- If there is no aggregate quote for the recurring event, then a new aggregate quote is complied, as well as any related property quotes and their related quotes.
- If an aggregate quote exists, and values at the lowest level (such as sleeping room and function agenda) have changed, then the quote is updated with the latest values.
- If an aggregate quote exists, and new subopportunity quotes have been generated for new properties, then the aggregate quote and aggregate property quotes are refreshed to reflect the changes.

When you have created an aggregate quote, you may view more detailed information about this quote through the Aggregate Quotes screen.

There are three lists in the Aggregate Quotes screen as follows:

- **Aggregate Quotes - Total.** This list provides the total aggregate quote for all properties. Only one quote can exist in this list.
- **Aggregate Quotes - Property.** This list provides the total aggregate quote for each property. There can only be one quote for each property in this list. The aggregate quote for each property totals all the quotes for events that are to be carried out at that property.
- **Related Quotes.** This is a list of all the quotes for a particular property in the series of recurring events. If you select the aggregate quote for a property in the Aggregate Quote - Property list, you can see all the quotes related to that property in this list.

This task is a step in Process of Creating Recurring Events on page 232.

To compile an aggregate quote for a recurring event

1 Generate quotes for the subopportunities of the recurring event as described in Generating Subopportunity Quotes on page 235.

2 Click the Aggregate Quotes view tab.

3 From the Aggregate Quotes view, click Aggregate Quote.

The aggregate quote (Aggregate Quote - Total) is compiled, as are aggregate quotes for all properties (Aggregate Quote - Property) associated with the recurring event.

NOTE: If you want to review all information associated with the aggregate quote, such as Functions, Room Blocks, Property Quotes, and related quotes, click the link in the Quote Name field. The Aggregate Quotes screen appears where you can review the information.

Compiling What-If Aggregate Quotes

What-If aggregate quotes allow you to create an aggregate quote for one particular property. This method is typically used when a number of different properties are competing for the same opportunity, and a sales representative or sales manager for the property wants to see if the value of the opportunity for their property was involved. This information may then be used in competitive bidding to show a customer that a certain property may be less expensive than another one. You can compile what-if aggregate quotes for as many properties as you want.

This task is a step in Process of Creating Recurring Events on page 232.

To compile a what-if aggregate quote for a recurring event

1 Generate quotes for the subopportunities of the recurring event as described in Generating Subopportunity Quotes on page 235.

2 Click the Aggregate Quotes view tab, and then click the Aggregate Quote (What If) link.

3 Click the Aggregate Quote button.

If a number of different properties are associated with the recurring event's subopportunities, then a dialog box appears, instructing you to select a property.

4 Select the required property for the what-if aggregate quote, and click OK.

The what-if aggregate quote is compiled and appears in the list, as do the related quotes for the property.

Completing an Aggregate Quote Evaluation

Using the Aggregate Quote screen's Evaluation view, the sales representative documents the revenue information that the revenue manager considers when making the decision to approve or reject the quote for the event. The evaluation form typically provides the following information:

- Incremental revenue sources that may result from the group or event. The sales representative can enter more than one incremental revenue source.
- Notes on potential future business that may result from the event.
- Commission information. More than one commission can be entered.

- The date by which the evaluation should be completed so that the sales representative can respond to the customer.
- The sales manager's comments.

This task is a step in Process of Creating Recurring Events on page 232.

To complete the revenue evaluation form

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the required opportunity.
3. Click the link in the Name field, and then click the Aggregate Quotes view tab.
4. In the Aggregate Quotes - Total list, click the link in the Quote Name field.

   The Aggregate Quotes screen is displayed.
5. Click the Evaluations view tab, and complete the fields. For more information about these fields, see Completing the Revenue Evaluation Form on page 419.

Performing a Price Override for Room Blocks Associated with an Aggregate Quote

If the sales representative wants to do so, it is possible to create a price override that mass updates all rates for all room types available at all properties. This means that at whatever property the recurring event occurs, the same rate can be offered to the customer for sleeping rooms.

This task is a step in Process of Creating Recurring Events on page 232.

To perform a price override for all sleeping room rates in all properties associated with an aggregate quote

1. Navigate to the Aggregate Quotes screen > Aggregate Quotes list view.
2. In the Aggregate Quotes list, query for and select the required aggregate quote.
3. Click the link in the Name field, and then click the Room Blocks view tab.
4. In the Aggregate Quote form menu, choose Price Override.

   The Price Override dialog box is displayed.
5. Do the following:
   - a In the Negotiation Rate field, enter the rate that you want to apply to the rooms.
   - b (Optional) If you want the rate to be applied to a specific type of room, select a room type from the Room Type selection dialog box.
   - c (Optional) If you want the rate to be applied to a specific property, select the property in the Property field.

d (optional) If you want the rate to be applied to all occupancy types for the room, click the occupancy field.

The rate is applied to the sleeping rooms, and this can be seen in the Discount Price field of the Room Blocks Line Items list.

Changing the Projected Property

In the Aggregate Quotes > All Quotes view, the sales representative can change the projected property for a subopportunity quote. This may be useful if the customer wants to change one of the events to a different property.

This task is a step in Process of Creating Recurring Events on page 232.

To change the projected property for a subopportunity quote

1. Navigate to the Aggregate Quotes screen > Aggregate Quotes list view.
2. In the Aggregate Quotes list, query for and select the required aggregate quote.
3. Click the link in the Name field, and then click the All Quotes view tab.
4. In the All Quotes list, select the required quote.
5. In the Aggregate Quote form menu, choose Change Projected property.

   The Change Property dialog box is displayed with a list of all properties that are related to this Aggregate quote.
6. In the Change Projected Property dialog box, select the property that you want to associate with the quote, and click Select.

   The quote is now associated with the new property.

Submitting an Aggregate Quote for Evaluation

An aggregate quote is automatically submitted to the designated revenue manager for review when the sales representative resets the value in the Status field of the evaluation form.

The status of the quote evaluation changes as the revenue management evaluation progresses through various stages. For more information about the Evaluation statuses, see Submitting a Quote for Revenue Evaluation on page 421.

When the sales representative changes the status of an aggregate quote, then this change is replicated in all of the subopportunity quotes. The aggregate quote is also displayed in the Evaluations screen at this stage, as are all subopportunity quotes associated with the aggregate quote. The sales manager can access the evaluation in the Evaluation screen list. After the evaluation is submitted, the evaluation form and the quote cannot be modified by the sales representative.

After the aggregate quote has been submitted, it may be evaluated in the same manner as other quotes. For more information, see Evaluating the Event Quote on page 422.

This task is a step in Process of Creating Recurring Events on page 232.

To submit an aggregate quote evaluation form to the revenue manager

1. Navigate to the Aggregate Quotes screen > Aggregate Quotes list view.
2. In the Aggregate Quotes list, query for and select the required aggregate quote.
3. Click the link in the Name field, and then click the Evaluation view tab.
4. In the Aggregate Quote Evaluation form, set the value in the Evaluation Status field to Submitted.

category

17 Managing Property-Specific Event Quotes

This chapter describes the procedures that event managers and operations personnel use to generate property-specific quotes for an event opportunity using Siebel Hospitality software. It includes the following topics:

- About Property-Specific Quotes on page 242
- Scenario for Managing Property-Specific Event Quotes on page 245
- Process of Managing Property-Specific Event Quotes on page 245
- Generating an Event Quote on page 246
- Generating Quotes from Opportunities on page 246
- Generating Quotes from Recurring Events on page 247
- Generating Quotes from Host-Affiliate Opportunities on page 247
- Modifying an Event Quote on page 248
- Changing the Event and Sales Manager for a Quote on page 249
- Overriding Multiple Event Quotes on page 250
- Applying a Property-Specific Event Template to a Quote on page 251
- Adding Details to an Event Quote on page 252
- Managing Functions Associated with Quotes on page 257
- Managing Event Room Block Information in Quotes on page 261
- Time Shifts for Function Spaces and Sleeping Room Blocks on page 265
- Reviewing Quote Details on page 265
- Reviewing Quote Discounts on page 270
- Reviewing Revenue Estimates for Quote Functions on page 276
- Reviewing Macro Estimates for Quotes on page 283
- Viewing the Quote Event Calendar on page 284
- Using Quote, Function, and Room Block Charts on page 285

The procedures in Chapter 15, “Capturing Hospitality Opportunities” should be completed before the procedures in this chapter are performed.

About Property-Specific Quotes

After the event sales representative generates a quote for each property, the opportunity phase of event planning ends, and the quote phase begins.

The opportunity is used to capture customer information about the event that may be applicable to a number of properties. Based on the information, quotes are generated, and the generic information is transformed to property-specific information. Quotes incorporate the availability and pricing response from each property, given the generic requirements captured during the opportunity stage.

Creating a property quote from the Opportunity screen's Properties view launches several system processes. Figure 9 shows an example of a typical process flow.

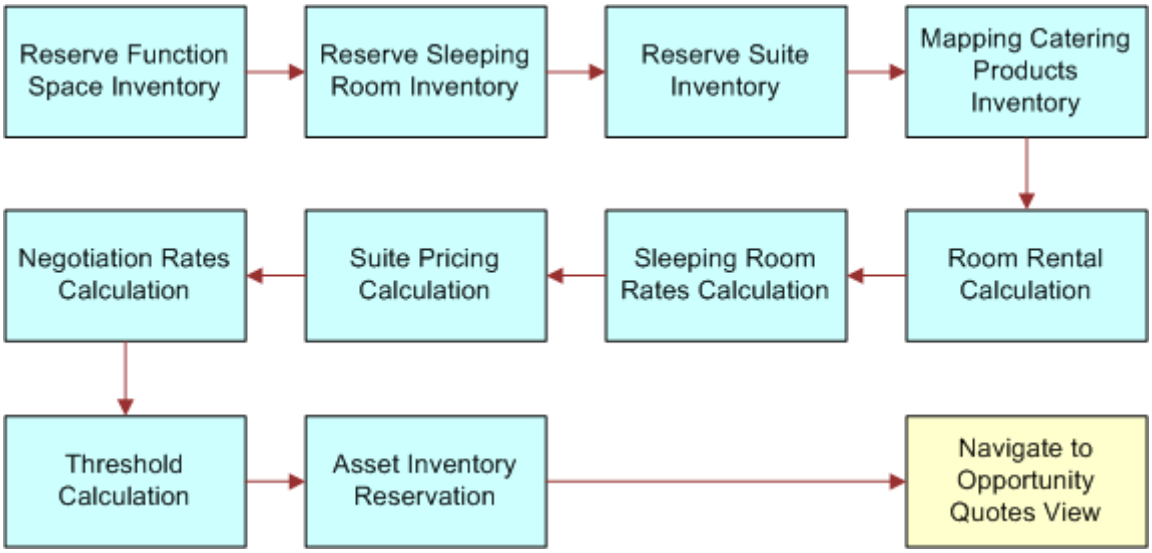


Figure 9. Generate Quote Processes

As shown in Figure 9, when a quote is generated, the following processes occur:

- Opportunity information is transferred to the quote. This includes notes, billing information and macro estimates.
- The generic products detailed in the opportunity are mapped to property-specific products.

  NOTE: This only occurs if the product mapping has been defined. For more information, see Mapping a Generic Catering Product to a Property-Specific Product on page 88.
- Room block information, room blocks, and line items from the opportunity are transferred to the Quote's Room Block views. In addition, the property availability check is launched to determine the availability of specified rooms. As part of this process, generic sleeping rooms are mapped to specific sleeping room types. A best-fit algorithm is also launched for function space availability. This algorithm translates the generic requirements for functions and then maps them to property-specific function spaces.

  NOTE: If the bypass flag has been set for any of the properties, the function space availability and the sleeping room availability checks are skipped.

- After the availability check is completed, the pricing process occurs.
- An asset inventory check for critical catering products is performed.

Quotes and the Best Fit Process

When you generate a quote, several process are launched as shown in Figure 9. One part of the reservation of function space inventory is the best fit process. The best fit process attempts to match a function space at the property with the most suitable function space by taking into account the size of the function room required, the amount of people attending, and the product features associated with the function space. If a function space is not found by the best fit process, then it is possible to simply associate a function with a function space manually.

Quotes and Nonparticipating Properties

For nonparticipating properties, generic products (line items and room blocks) are not mapped to property-specific products. Instead, the generic agenda is replicated in the quote's line items view.

Pricing information is not associated with room blocks, and the availability check for both room blocks and function space is not performed. Also, the critical asset inventory check is not performed.

NOTE: It is advised that one sleeping room is created for NPPs, and that this sleeping room is mapped to a generic sleeping room. This is so that when the quote is generated, a line item from the opportunity may be mapped to the sleeping room at the NPP. For more information, see Setting Up Nonparticipating Properties on page 39.

When a quote is generated for a non-participating property, the NSO, EBC, or whoever creates the quote must provide details to the NPP about the opportunity, and must then request pricing and availability information.

For more information about nonparticipating properties, see Chapter 21, "Managing Nonparticipating Properties."

Asynchronous Generation of Multiple Quotes

Siebel Hospitality allows synchronous generation of multiple quotes. The sales representative should be aware of the following regarding asynchronous generation of quotes:

- In the Opportunity Capture view or the Opportunity Properties view, the sales representative can select multiple records in the Properties list and click the Create Quote button. This creates one quote for each of the selected properties.
- When generating Affiliate Quotes for a number of Affiliate Opportunities associated with a Host Opportunity, the sales representative may select multiple records in the Affiliate Opportunities list and click Create Quote. This creates one quote for every property associated with every selected affiliate opportunity.
- When generating subopportunity quotes for a number of subopportunities associated with a recurring opportunity, the sales representative may select multiple records in the Sub Opportunities list and click Create Quote. This creates a quote for every property associated with every selected subopportunity.

- If the sales representative does not have permission to generate quotes for some of the selected properties (that is, the user is unable to view those properties in the Properties Screen), then those properties are included in the Create Quote operation.
- If there are already existing quotes for the same opportunity for some of the selected properties, and the existing quotes have the Do Not Override flag checked, then those properties are included in the Create Quote operation.
- If the projected property (primary property) for the opportunity was one of the properties selected for quote creation, then its quote is always the first one generated.
- When the Create Quote button is clicked, one quote is created immediately and the user is taken to the corresponding Opportunity Quotes view, where the newly generated quote is visible. It has a status of Prospect if the Create Quote operation succeeded, or a status of Error if an application error occurred. The sales representative should ask the system administrator to review the Siebel application log to find the cause of such errors.
- The user can re-query the Opportunity Quotes list to see the progress of quotes being generated in the background. If a quote's status is Generating, it is still in the process of being created.

The following points illustrate the effect that asynchronous generation of quotes have on system administration:

- The asynchronous generation of quotes (that is, the second and subsequent quotes in a multiple selection) is handled by a separate Siebel Server component called Hospitality Quote Generation (HospitalityQuoteGen). This component and the object manager server component Hospitality Object Manager (eHospitalityObjMgr) are both part of the Hospitality component group.
- Usually, the server component HospitalityQuoteGen is active and running on the same application server as the eHospitalityObjMgr. However, it is possible for this component to be placed on a separate Siebel application server.
- The setting for the expected number of HospitalityQuoteGen threads running simultaneously on a given server can be determined by dividing the estimated total number of quotes generated per hour by 180, then dividing again by the number of Siebel application servers over which this load is distributed, and rounding up. (This formula assumes that quotes take approximately 20 seconds to generate.) This figure can be used to set the MaxMTTasks parameter of the server component.
- If a quote is created in the background and has a status of Error, the cause can be found in the log file HospitalityQuoteGen_<PID>.log in the Siebel log file directory. Sometimes it is necessary to increase server component event logging levels in order to determine the cause of such an error.
- The system administrator can turn off background generation of quotes by going to Administration - Application > System Preferences and adding a new System Preference named Background Quote Generation with a value of N. This generates all the quotes in a multiple selection synchronously. The user interface is not changed to display the Opportunity Quotes view until all the quotes have finished being generated. If many quotes are being generated at once, the application may take some time to respond.

Scenario for Managing Property-Specific Event Quotes

This scenario provides an example of a process performed by event sales representatives. Your company may follow a different process according to its business requirements.

After capturing the customer's opportunity information, the sales representative generates quotes for each selected property so that the availability and pricing information for each property can be presented to the customer. In some cases, either the function space or the room blocks are not available for the selected property. The sales representative tries to find other accommodations within the property.

If the customer does not like the projected price, the sales representative can search for room block alternatives, or offer a discount to the customer.

During this process, the sales representative also reviews the average value of each property, performs revenue rollups by parent category and category, and checks the summary for each of the properties.

Process of Managing Property-Specific Event Quotes

This topic lists the tasks typically performed by sales representatives when generating property-specific quotes for an event. Your company may follow a different process according to its business requirements.

To generate property-specific quotes for an event, perform the following procedures:

1 Generating an Event Quote on page 246

2 Generating Quotes from Opportunities on page 246

3 Generating Quotes from Recurring Events on page 247

4 Generating Quotes from Host-Affiliate Opportunities on page 247

5 Modifying an Event Quote on page 248

6 Changing the Event and Sales Manager for a Quote on page 249

7 Overriding Multiple Event Quotes on page 250

8 Applying a Property-Specific Event Template to a Quote on page 251

9 Adding Details to an Event Quote on page 252

10 Managing Functions Associated with Quotes on page 257

11 Managing Event Room Block Information in Quotes on page 261

12 Reviewing Quote Details on page 265

13 Reviewing Quote Discounts on page 270

14 Reviewing Revenue Estimates for Quote Functions on page 276

15 Reviewing Macro Estimates for Quotes on page 283

16 Viewing the Quote Event Calendar on page 284

17 Using Quote, Function, and Room Block Charts on page 285

Generating an Event Quote

There are a number of different types of quotes that can be created in Siebel Hospitality. Quotes can be generated for ordinary opportunities, for recurring events, and for host-affiliate opportunities. Because the opportunities are created in different ways using different views, the generate quote process is different for each of these opportunity types.

This section contains the following topics, and is a step in Process of Managing Property-Specific Event Quotes on page 245.

- Generating Quotes from Opportunities on page 246
- Generating Quotes from Recurring Events on page 247
- Generating Quotes from Host-Affiliate Opportunities on page 247

Generating Quotes from Opportunities

Property-specific quotes can be generated from ordinary opportunities from the Opportunity > Properties view. Perform the following procedure to generate a property-specific quote.

This task is a step in Process of Managing Property-Specific Event Quotes on page 245.

To create a quote for an event property

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Properties view tab, and in the Properties list, create a new record.
5. In the Add Properties dialog box select the property, and then click OK.
6. (Optional) In the Properties list, click Bypass, if availability checks should be omitted.
7. Click Create Quote.

   The quote is created, and the Opportunity Quotes view appears.

NOTE: You can also generate multiple quotes by selecting multiple properties and clicking Create Quote. If you use this method, the quote for the primary property is created first, and then all other quotes are created.

Related Topic

Modifying an Event Quote on page 248

Generating Quotes from Recurring Events

Quotes cannot be generated from parent recurring opportunities, because a sales representative must be able to generate quotes, orders, and event checks for each individual event at the time the event occurs, and there may be time gaps between events in a recurring opportunity. Quotes can be generated, however, for individual events in a series of recurring events from the Sub Opportunities view.

For more information about generating quotes from recurring events, see Chapter 16, "Managing Recurring Events."

This task is a step in Process of Managing Property-Specific Event Quotes on page 245.

Generating Quotes from Host-Affiliate Opportunities

When a host opportunity has been defined, that is, room block, functions, affiliate opportunities, and so on, it is possible to generate a quote for the host opportunity. When the quote and its information have been reviewed, the host may confirm that the quote is definite. When the host quote becomes definite, it is then possible for affiliates to call and confirm that they are affiliated with the quote. At this stage, affiliate quotes may be generated from the affiliate opportunities.

This section contains the following topics, and is a step in Process of Managing Property-Specific Event Quotes on page 245.

- Generating Host Quotes on page 247
- Generating Affiliate Quotes on page 247

Generating Host Quotes

Host quotes are generated in the same manner as ordinary quotes. You must generate a quote for the primary property associated with a host quote. For more information about generating quotes from host opportunities, see Generating Quotes from Opportunities on page 246.

NOTE: When you generate a quote from a host opportunity, the affiliate information associated with the opportunity is also transferred to the quote.

This task is a step in Generating Quotes from Host-Affiliate Opportunities on page 247.

Generating Affiliate Quotes

Affiliate quotes can only be generated after the Sales Status of the host quote is set to Definite. At this stage, affiliates can confirm that they are associated with the opportunity.

This task is a step in Generating Quotes from Host-Affiliate Opportunities on page 247.

To generate an affiliate quote

1. Define the required host quote as described in Process of Managing Property-Specific Event Quotes on page 245.
2. Review the quote details with the host company, and if the host company is satisfied with this quote, perform the following steps:
   a. Navigate to the Quotes view tab for the host opportunity.
   b. In the quote record, set the Sales Status field to Definite.

   NOTE: If the Quote Sales Status Model is activated, and the Threshold Profit Variance is less than or equal to zero, you cannot change the Sales Status to Definite until you have changed the Evaluation Status of the quote to Approved. If the Quote Sales Status Model is activated and the Thresholds Profit Variance is greater than zero, or if the Quote Sales Status Model is not activated, then the Evaluation Status does not need to be changed to Approved to upgrade the quote status to Definite. To set the Evaluation Status to Approved, navigate to the Evaluations view tab of the host opportunity, and change the status to Approved.
3. Click the Affiliate Opportunities view tab.
4. Select the required opportunity (or opportunities), and click Create Quote.

   The quote or quotes is created, and the Affiliated Opportunities > Quotes view is displayed, showing the property and quote associated with the subopportunity.

Modifying an Event Quote

After a quote is created, the sales representative may update certain quote information such as the quote name or sales status from the Opportunity Quotes view.

This task is a step in Process of Managing Property-Specific Event Quotes on page 245.

To modify a quote using the Opportunities Quotes view

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the opportunity record, click the link in the Opportunity Name field.
4. Navigate to the view or subview appropriate to the modification you want to make:
   - To modify the opportunity quotes, click the Quotes view tab.
   - To modify subopportunity quotes, click the Sub Opportunities view tab, and then click the Sub Opportunity Quotes link.
   - To modify affiliate quotes, click the Affiliate Opportunities view tab, and then click the Quotes link.

5 In the Quotes list, select the quote and revise the quote information as needed.

The following table describes some of the fields in the quote record.

Field	Comments
Quote Name	The quote name. This field is automatically populated with the name of the opportunity but can be changed if required. Click the Quote Name link to navigate to the Quote Functions view.
Quote #	System-generated unique value. Click the Quote # link to navigate to the Quote Room Blocks view, where room block items can be added and item attributes defined.
Total	Total estimated revenue (rollup).
Property	The property associated with the quote.
Sales Status	When a quote is generated, the default sales status is Prospect. This value can be changed to Hold, Customer Approved, Adjusted, T1, T2, and so on to reflect the actual sales status of the event opportunity.
Arrival Date	The start date for the event at the property.
Departure Date	The end date for the event at the property.
# of Nights	Calculated from values in the Arrival Date and Departure Date fields.
Do Not Override	Set this flag (check box) if the quote should not be subject to an override action. The Do Not Override flag is set as the default.
Post as Name	The name by which the event is posted.
Decision Date	The date by which the customer must make a decision. The value in this field is copied from the opportunity, but can be changed.

Changing the Event and Sales Manager for a Quote

When a quote is generated from an opportunity, the Sales Manager and Event Manager information for the opportunity is transferred to the quote. However, if necessary, the sales representative can change the Event Manager and Sales Manager. If the sales representative decides to do this, then the following rules are applied to the change:

- If the sales representative picks a Sales Manager or Event Manager who is not yet on the quote team, then that person is automatically added to the team.
- If the sales representative decides to remove a person from the team that also happens to be the Sales Manager or Event Manager for the quote, then the sales representative is warned that the person that they are trying to remove has been designated as the Sales Manager or Event Manager.
- If the sales representative removes someone from the Sales Manager or Event Manager field, then the sales representative is given the option to also remove that person from the quote team.

This task is a step in Process of Managing Property-Specific Event Quotes on page 245.

To change the Sales Manager or Event Manager for a quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote.
3. Click the link in the Name field, and click the Show More button.
4. In the Quote form, scroll down to the Manager Information section of the form, and do one of the following as required:
   - Click the select button in the Sales Manager field.
   - Click the select button in the Event Manager field.
5. In the Pick Employee selection dialog box, select the person who would like to act as the new Sales Manager or Event Manager for the quote, and then click OK.

   If there is a person already designated as the Sales Manager or Event Manager for the quote, then a dialog box is displayed asking if you wish to remove the existing person from the team.
6. Do one of the following:
   - To replace the existing manager and also remove that person from the Quote team, click OK.
   - To replace the existing manager but retain that person as part of the team, click Cancel.

Overriding Multiple Event Quotes

Changes can be made across all the event quotes associated with a specific opportunity. The user performs this task by updating the opportunity record and overriding all the quotes associated with the opportunity.

If a particular quote should not be overridden, the Do Not Override flag is set for the opportunity quote record. Selecting the check box flag indicates the quote is to be ignored and not be overridden by the new quote created from the opportunity.

This task is a step in Process of Managing Property-Specific Event Quotes on page 245.

To modify multiple quotes using the Opportunities Quotes view

1. Navigate to the Opportunities screen > Opportunities List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Function Agenda view tab, select the Function Agenda record, and make any necessary updates to the record.
5. Scroll down to the Agenda Line Items list, and make any necessary updates to the records.
6. Click the Room Blocks view tab, select the Room Block record, and make any necessary updates to the record.

7 Scroll down to the Room Block Line Items list, and make any necessary updates to the records.

8 Click the Quotes view tab.

9 In the Quotes list deselect the Do Not Override check box for each record that should be overwritten.

10 Click the Properties view tab and in the Properties list, select the property record, and then click Create Quote.

Applying a Property-Specific Event Template to a Quote

When a quote has been created, you can apply a property-specific event template or the format of an existing quote to the new quote to define standard information about that quote. For example, there may be an event template for a wedding at the Grand Hotel, where there are a number of standard functions and room blocks that are used for the wedding. The sales representative might then apply this template, which applies the property's specific details for a wedding to the quote.

When you apply an event template to a quote, you overwrite the existing information in the quote with information contained in the template. For information about creating an event template, see Chapter 12, "Defining Event Templates."

This section includes the following topics, and is a step in Process of Managing Property-Specific Event Quotes on page 245.

To apply a property-specific event template to a quote

1 Navigate to the Quotes screen > Quotes list.

2 In the Quotes list, query for and select the quote.

3 Click the menu button, and select Apply Event Template.

4 In the Pick Event Template/Quote dialog box, complete the fields, and then click OK.

The following table describes some of the fields.

Field	Comments
Template/Quote	Provides a list of all property-specific event templates and existing quotes that can be applied as a template to the new quote.
Arrival Date	Select an arrival date for the event.
Header	If you select this check box, the information contained in the More Info form and the Room Block Info form of the new quote is overwritten by the information contained in the template.
Functions	If you select this check box, all functions in the template are copied to the new quote.

Field	Comments
Sub Functions	If you select this check box, all subfunctions in the template are copied to the new quote.
Line Items	If you select this check box, all line items for functions and subfunctions in the template are copied to the new quote.
Room Blocks	If you select this check box, all sleeping room blocks in the template are copied to the new quote.
Room Block Line Items	If you select this check box, all sleeping room block line items in the template are copied to the new quote.

NOTE: Event templates may be applied to opportunities for nonparticipating properties.

Creating an Event Template from a Quote

If the information defined in a quote could be useful when creating future event quotes, you can create a template from the existing quote.

To create an event template from an existing quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. Click the menu button, and select Create Specific Template.

   The template is created in the Property Specific list in the Event Templates screen.

Adding Details to an Event Quote

During the quoting stage of event management, the sales user can support standard business operations and perform a number of tasks using Quote screen views.

This section contains the following topics, and is a step in Process of Managing Property-Specific Event Quotes on page 245.

- Modifying the Arrival Date in an Event Quote on page 253
- Adding Quote Notes on page 254
- Creating Quote Activities on page 254
- Creating Attachments for a Quote on page 255
- Capturing Billing Information for a Quote on page 255
- Capturing Booking Fee Information on page 255
- Capturing Credit Requests for an Event Quote on page 256

These tasks are steps in Process of Managing Property-Specific Event Quotes on page 245.

Modifying the Arrival Date in an Event Quote

Users can change the event arrival and departure date information, or delete the arrival date in a quote if necessary.

This task is a step in Adding Details to an Event Quote on page 252.

To modify the arrival date in a quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote.
3. In the Quote form, click the select button in the Arrival Date field.
4. In the Enter/Change Arrival Date dialog box, select the new date, and choose a value in the Instructions field.

   The Instructions values are:

   - **Update Dates.** If the user modifies the arrival date and then selects Update Dates in the Instructions field, the dates of the room blocks and functions that are associated with the quote change according to the new date. The availability process is relaunched to check availability for the new date. All dates are updated by default if instructions are not specified.
   - **Update Day Numbers.** If the user modifies the arrival date and then selects Update Day Numbers in the Instructions field, the dates of the function and room block stay the same as the original, and the availability process is not launched. The Day Number field for each function or room block record is modified to reflect the new relationship between the quote arrival date and the function or room block date.
5. Click OK to save the modification.

To delete the arrival date in a quote

1. Navigate to the Quotes list view.
2. In the Quotes list, query for and select the required quote.
3. In the Quote form, click the select button in the Arrival Date field.
4. In the Enter/Change Arrival Date dialog box, delete the arrival date, and then select a value in the Instructions field.

   The Instructions values are:

   - **Clear All Dates.** If the user deletes the arrival date and then selects Clear All Dates in the Instructions field, all room block and function dates that are associated with the quote are also deleted. All dates are cleared by default if instructions are not specified. If you choose to clear all dates, a dialog box is displayed that informs you that all inventory associated with the quote is lost. You can then choose to clear all dates or cancel the operation.
   - **Only Clear Arrival Date.** If the user deletes the arrival date and then selects Only Clear Arrival Date in the Instructions field, the dates and day numbers of the functions and room blocks remain unchanged.

5 Click OK to save the modification.

Adding Quote Notes

The sales user can attach property-specific notes to the quote using the quote's Notes view. Notes can be designated as private, only accessible by the creator, or public, accessible by the entire events planning team.

This task is a step in Adding Details to an Event Quote on page 252.

To add notes to a quote

1 Navigate to the Quotes screen > Quotes List view.

2 In the Quotes list, query for and select the required quote record.

3 In the Quote record, click the link in the Name field.

4 Click the Notes view tab, and choose Public Notes or Private Notes from the visibility filter.

5 In the Notes list, add a record, and then add the note text in the Description field.

6 Save the note.

Creating Quote Activities

The sales user can create activities for the quote. For example, if a customer requests a special menu, the sales user can create an activity to ask the event manager to verify whether or not the property can accommodate the request.

This task is a step in Adding Details to an Event Quote on page 252.

To add activities to a quote

1 Navigate to the Quotes screen > Quotes List view.

2 In the Quotes list, query for and select the quote record.

3 In the Quote record, click the link in the Name field.

4 Click the Activities view tab.

5 In the Activities list, create a record, and complete the fields.

   Set the priority and status to flag activities that need immediate attention.

6 Save the activity.

Creating Attachments for a Quote

A sales representative can use the Attachments view to attach relevant document and other media to the quote during the quoting phase. Attachments may include relevant documents, files or images that may be of use when supplying a quote to the customer. For example, a customer may want to view a brochure for a standard event, such as a wedding.

This task is a step in Adding Details to an Event Quote on page 252.

To add attachments to a quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Attachments view tab.
5. In the Attachments list, click either New File or New URL.
6. Associate the file, and then save the record.

Capturing Billing Information for a Quote

The billing information captured for the opportunity is automatically transferred to the quote record. Sales users can verify and update the billing information using the Billing view. This includes information about the contact or account that should be billed, information about a deposit for the quote, tax exemption details, and payment information.

This task is a step in Adding Details to an Event Quote on page 252.

To update and verify billing information

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Billing view tab.

   The Billing form shows the quote billing information.
5. Make necessary changes to the billing information, and then save the record.

Capturing Booking Fee Information

Each sales representative may be responsible for bookings for a region or a cluster of hotels. The representative can still book and refer customers to hotels outside of the representative's immediate area of responsibility. Hospitality properties outside the representative's region usually pay an agreed-upon booking fee for the business.

Using the Fees view, the representative and event manager can enter the expected booking fees and then return to the view and complete the rest of the fields when the fees are collected.

This task is a step in Adding Details to an Event Quote on page 252.

To enter and track booking fee information

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote.
3. In the Quote record, click the link in the Name field.
4. Click the Fees view tab.
5. In the Booking Fees form, complete the fields.

   The following table describes some of the fields.

Field	Comments
Booking Fee Eligible	When selected, this check box indicates that the quote is eligible for booking fees.
Fee Eligible By	Automatically populated with the User ID of the sales user who determines the quote to be eligible for a booking fee.
Booking Fee Amount	The amount of the booking fee that is due.
Eligible Date	The date the user sets the booking fee eligibility.
Booking Fee Accepted	The check box indicates that the booking fee information has been verified.
Fee Accepted By	The ID of the representative who accepts the eligibility claim.
Accepted Date	Automatically populated when the hotel representative indicates acceptance of the eligibility claim.
Booking Fee Collected	When selected, this flag indicates that the booking fee has been collected.
Collected Amount	The amount of the booking fee that is collected.
Collected By	The User ID of the sales representative who collects the booking fee.
Collected Date	The date the booking fee is collected.

Capturing Credit Requests for an Event Quote

The Credit Request view allows the sales representative and event manager to determine the credit status and log credit information for an event group that requests credit for event costs.

This task is a step in Adding Details to an Event Quote on page 252.

To enter credit check information for an event quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Name field.
4. Click the Credit Requests view tab.
5. In the Credit Requests list, add a record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Request Type	Check or Reserve. Check allows the user to precheck the group's credit to determine the credit rating before the group's arrival. Only Hold, T1 and T2-designated groups are eligible for the Check request type. A Reserve Request Type is required for a group with a Definite status.
Credit Requested Date	Shows the date of the credit request.
Account to Charge	Primary or Intermediary. An intermediary account is related to the primary account, and the relationship is established during Opportunity creation.
Request Status	Options are Pending, Recommend, Warn, Deny, and Cancel.
Credit Request Amount	The amount of credit that is requested.
Direct Bill Application Approved	The status of the credit application received by accounting. This check box indicates to the sales representative and event manager whether or not an alternate method of payment is required.
Direct Bill Application Received	This field is used by hospitality properties that are not connected to a credit system. When selected, the check box indicates to the sales representative and event manager that the customer has completed the direct bill application.
Credit Requested By	Automatically populated with the User ID of the individual who submits the request for credit approval using a credit system.

NOTE: This credit check functionality is for information purposes only. In order for the credit check to work, an integration with a credit system must be built.

Managing Functions Associated with Quotes

When the sales user clicks Generate Quote, function records are automatically created with fields populated and hierarchical relationships defined if the function has been defined at the opportunity stage.

However, for nonparticipating properties, only the generic agenda is replicated and appears in the quote's Function Line Items view. No mapping to property specific function space occurs. For more information about nonparticipating properties, see Chapter 21, "Managing Nonparticipating Properties."

This section contains the following topics, and is a step in Process of Managing Property-Specific Event Quotes on page 245.

- Adding Functions and Function Line Items to a Quote on page 258
- Adding Resource Cluster Line Items on page 259
- Validating Functions and Function Line Items on page 259
- Preventing Functions from Being Moved on page 260
- Changing Selected Function Spaces with Product Features on page 261
- Managing Quote Functions from the Function Screen on page 261

Adding Functions and Function Line Items to a Quote

The following procedure details how to add functions and line items to a quote.

This task is a step in Managing Functions Associated with Quotes on page 257.

NOTE: In order to add catering or common products as line items to a function, visibility for the product must be set up. For more information, see Adding Catalog Visibility to Products on page 82.

To add functions and line items to a quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Functions list, add a record, complete all the fields, including the following:
   - **Function Space.** This is a multi-value group field. In this field, you can enter details about the function space, such as whether or not it is the primary space, whether or not backup is required, the booking type, the setup style, and the inventory status of the space.
   - **Function Status.** This field is automatically populated with a value of Prospect. You can change this value as required to indicate whether or not the function is to go ahead.
5. Scroll down to Line Items, and add additional line items if necessary.

   NOTE: You can add a number of items at the same time using the Add Items button. This button allows you to add different quantities of different products at one time.

For a description of Function and Function Line Item field values, see Adding a Function Agenda and Line Items to an Event Opportunity on page 203.

NOTE: It is also possible to add functions and line items to quotes for nonparticipating properties.

Adding Resource Cluster Line Items

If necessary, you can add products from different properties as line items to the quote. These products must be booked and borrowed from properties in the sales representative's property cluster.

Before a sales representative can add resource cluster line items, property clusters must be set up, and properties must be added to these clusters. For more information, see Setting Up Property Clusters on page 50.

This task is a step in Managing Functions Associated with Quotes on page 257.

To add resource cluster line items to a quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Name field.
4. In the Functions list, select the required record.
5. Scroll down to the Line Items list, and create a new record.
6. Click the Select button in the Item field.

   The Pick Line Item selection dialog box is displayed.
7. Click the Show Cluster Products button.

   All line items for properties in the cluster are displayed.
8. Add the required resource cluster line items as required.

Validating Functions and Function Line Items

The following procedure details how to validate functions and line items associated with quotes.

This task is a step in Managing Functions Associated with Quotes on page 257.

To validate functions and function line items associated with a quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Quotes Functions list, select the function, and verify function information.
5. In the Function Line Items list, verify line item information, and perform the following actions if the line item is a menu item:

   a. Specify a value in the Course # field. This action identifies the course associated with this line item when the Banquet Event Order is printed.

b If necessary, change values in the Service Start Time and Service End Time fields. These times default to the function start and end times. If the values are changed, the asset inventory status changes to Not Booked, and asset inventory must be booked again for the specified time.

NOTE: When you verify information, you may want to update pricing information for nonparticipating properties. To update pricing, enter the value of the line item in the Negotiated Price field for the Function Line Item.

Preventing Functions from Being Moved

When defining functions using the Quotes screen's Functions view, a user can prevent other users from moving the function to an alternative function space by using the Do Not Move flag. The Do Not Move Flag check box is cleared by default, which means that other users can typically move functions as required, subject to time and space availability.

The Do Not Move Flag check box is only enabled if the reserved primary function space is a specific space. If the booking is for a category, the Do Not Move Flag check box is read-only. If a user tries to change the Function Space value to a category after the Do Not Move check box has been selected, a message is displayed, asking for confirmation. If the user clicks OK, the Do Not Move Flag check box is cleared and the booking is changed to a category.

NOTE: The handling of bookings with the Do Not Move flag can vary depending on configuration carried out by the administrator. See Configuring the Do Not Move Flag on page 62 for more information.

In the diary views, bookings that cannot be moved because of this flag are indicated with a padlock icon. Using query assistant, a search can be performed to locate bookings with the Do Not Move flag.

This topic is a step in Managing Functions Associated with Quotes on page 257.

To prevent functions from being moved

1. Navigate to the Quotes Screen > Quotes List view.
2. In the Quotes list, query for and select the quote record.
3. In the quote record, click the link in the Name field.
4. In the Functions list, add a record and complete the fields.
5. Scroll down, click the Function Space tab, and then add a new function space record.
6. In the function space record, complete the fields, making sure that you select the Primary check box and choose a specific function space in the Function Space field.
7. Click Reserve to reserve the inventory.

   The Inventory status must be set to Reserved; otherwise, you cannot complete the next step, because the Do Not Move Flag check box is unavailable.
8. Scroll back up to the Functions list, and select the Do Not Move Flag check box.

Changing Selected Function Spaces with Product Features

If product features are specified as part of the function agenda in the opportunity, these features are copied to the functions when a quote is created. They are visible in the Quotes Functions view.

If you then attempt to change the function space selected by the create quote best fit process to a space that does not contain the requested features, an error message appears. The new choice for function space is accepted only if it can also support the specified product feature.

This topic is a step in Managing Functions Associated with Quotes on page 257.

Managing Quote Functions from the Function Screen

After the quotes are created, and the sales representative has reviewed the booking status from the quote's Functions view, the user can perform detailed asset inventory bookings from the Functions screen > Line Items view. The Function Space field in this view becomes a multi-value group field.

For example, the user can check the details of assets that are associated with the product using the Functions screen's Line Items Assets view. In addition, users can book noncritical products as well as critical products and double-book a particular asset using this view. For more information, see Chapter 19, "Booking Hospitality Assets."

NOTE: When critical products are selected, the asset inventory booking mechanism is automatically launched.

A visual representation of the inventory bookings is available in the Function Line Items Availability view and the Category Availability view.

This topic is a step in Managing Functions Associated with Quotes on page 257.

Managing Event Room Block Information in Quotes

When a quote is generated for an opportunity, the followings activities occur:

- Sleeping room availability for the room block is checked.
- Sleeping room pricing is launched, which generates the pricing information for all sleeping rooms.
- Room blocks and room block line items are mapped to property-specific rooms and line items.

  For more information about these processes, see "Defining Sleeping Room Inventory Controls" on page 124.

Alternatively, when a quote is generated from a nonparticipating property, sleeping room availability and pricing are not performed, and the generic room block information is simply replicated for the quote. For more information about NPPs and sleeping rooms, see Managing Nonparticipating Properties on page 371.

This section contains the following topics, and is a step in Process of Managing Property-Specific Event Quotes on page 245.

- Updating Room Block Information for a Quote on page 262
- Updating Room Blocks and Line Items for a Quote on page 262
- Updating Negotiation Rates for a Quote on page 263
- Reviewing the Room Block Summary on page 264

Updating Room Block Information for a Quote

The room block information is copied from the opportunity when the quote is generated, but you can modify this information for the quote if necessary.

This task is a step in Managing Event Room Block Information in Quotes on page 261.

To update room block information for the quote

1. Navigate to the Quotes screen >Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field.
4. In the Room Blocks form, update the fields as necessary.

Updating Room Blocks and Line Items for a Quote

Room blocks and line items are transferred from the opportunity to the quote when the quote is generated, but this information can be updated at the quote stage if necessary. You can add new room blocks and line items at this stage. The Room Blocks view also allows you to launch availability and pricing checks.

This task is a step in Managing Event Room Block Information in Quotes on page 261.

NOTE: In order to add products as line items to a room block, visibility for the product must be set up. For more information, see Adding Catalog Visibility to Products on page 82.

To update room block information for a quote

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Blocks view tab.
4. In the Room Blocks list, add new records or update existing records as required.

   If you drill down on the room block Name field, you arrive at the Room Block screen, where you can further define or modify the room block.

To add line items for a room block

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Blocks view tab.
4. Scroll down to the Room Block Line Items list, and add a record.

   NOTE: In the Room Blocks list, you are allowed only one record with the same Room Type and Day #.

5. Complete the fields, and save the record.

   Repeat Step 3 through Step 5 to specify additional room block line items.

   NOTE: You can view complete details for a room block line item using the Room Block Line Items screen.

Updating Negotiation Rates for a Quote

Negotiation rates for a quote are calculated from the opportunity when the quote is generated. The Negotiation Rates view allows the sales representative and event manager to see the average rates by weekend, weekday, and so on. This view also allows these users to give special discounts for sleeping rooms when the customer is bringing in a great deal of function space revenue. The Negotiation Rates - Manager view allows the event manager to change the floor negotiation rates for this specific quote if necessary.

This task is a step in Managing Event Room Block Information in Quotes on page 261.

To view and update room block negotiation rates

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Blocks view tab.
4. Scroll down and click the Negotiation Rates view tab.
5. Click Calculate Rates.
6. Update the Negotiation Rate and Weekend Negotiation Rate fields if necessary.

   The values in the Negotiation Rate and Weekend Negotiation Rate fields are validated. The Negotiation Rate should be greater or equal to the Average Floor. The Weekend Negotiation Rate should be greater than the Weekend Floor.

To change the floor negotiation rates

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Blocks view tab.

4 Scroll down, and click the Negotiation Rates - Manager view tab.

5 Click Calculate Rates.

6 Update the Avg Floor field and other negotiation rates as necessary.

NOTE: Only the Revenue Manager should change the floor Negotiation Rates.

Reviewing the Room Block Summary

The Room Block Summary provides details about all room blocks for a particular quote and also provides a means of managing all room block details from one view. You can complete all tasks described in "Managing Event Room Block Information in Quotes" on page 261 from the Room Block Summary view.

The Room Block Summary contains the following form and lists:

- **Date Query Filter form.** The date field allows the sales representative to search for a particular date on which room blocks for a quote exist. When the user has filtered on the date, details of the Room Block are displayed in the two lists.
- **Room Block Summary list.** The Room Block Summary shows the summary information for all room blocks associated with the quote. It shows a summary of each particular room type and the attributes associated with this room type, including the single price of the room, the number of contracted rooms, the number of blocked rooms, the projected number of rooms that are used, and the number of rooms that have been picked up. It does this for each date on which the room type has been blocked. It is possible to view Sell Notes and Special dates associated with the room block by clicking the Dates/Notes button in this list. It is also possible to view the total group availability information for each room type by clicking the Available button. The Switch button allows the user to sort the columns by Attribute and then by room type.
- **Line Items list.** The Line Items list allows users to manage line items associated with a room block. This list displays all room blocks, room types, and attributes associated with line items. From this list, it is possible to reserve, overbook, and parcel sleeping rooms. For more information on reserving, overbooking, and parceling rooms, see Chapter 18, "Working with Inventory." You can edit the room price, the number of contracted rooms, the number of blocked rooms, the projected number of rooms that are used, and the number of rooms that have been picked up. From the menu, it is also possible to reprice sleeping rooms. For more information on room block pricing, see Chapter 23, "Working with Quote and Order Pricing."

This task is a step in Managing Event Room Block Information in Quotes on page 261.

To review summary information for all room blocks

1 Navigate to the Quotes screen > Quotes List view.

2 In the Quotes list, query for and select the quote.

3 In the Quote record, click the link in the Quote # field, and then click the Room Block Summary view tab.

4 In the Date field, enter a date on which rooms are booked, and click Search.

The room block summary information is displayed in the Room Block Summary and Line Items lists.

5 Review and modify information as required.

Time Shifts for Function Spaces and Sleeping Room Blocks

As part of setting up function spaces and sleeping rooms with relevant attributes, users can perform time shifts of functions and sleeping rooms using the Quote Time Shift view. For more information on time shifting, see Time Shifting Event Functions and Room Blocks on page 318.

This topic is included in Process of Managing Property-Specific Event Quotes on page 245.

Reviewing Quote Details

As part of the quote management process, the user can review quote details and summaries, revenue estimates, and negotiation rates for the quote. It is important that revenue estimates are reviewed before an order is generated so that the information is as accurate as possible.

This section contains the following topics, and is a step in Process of Managing Property-Specific Event Quotes on page 245.

- Reviewing Quote Summary Information on page 265
- Reviewing Macro Estimates for Quotes on page 283
- Reviewing Quote Summary Negotiation Rates List on page 268
- Reviewing Quote Summary Functions List and Function Line Items List on page 268
- Reviewing Quote Summary Room Blocks List and Room Block Line Items List on page 269

Reviewing Quote Summary Information

In the Quotes Summary view, the sales user can see the revenue, profit, and availability information for the function spaces and room blocks associated with the quote. The Summary form displays a summary of the sleeping room, function space, and total quote revenue and profit information.

The Summary view also contains the following lists:

- **Revenue Thresholds.** This is a list of all revenue thresholds for the parent revenue categories associated with the quote.
- **Negotiation Rates.** This is a list of all sleeping room negotiation rates associated with the quote.

This task is a step in Reviewing Quote Details on page 265.

To review the quote summary

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Name field.
4. Click the Summary view tab.
5. From the quote Summary form, scroll down to view information in the Revenue Threshold, Negotiation Rates, Functions and Room Block Items lists.

   NOTE: For nonparticipating properties, all of this information is editable, as the pricing functionality is not available for nonparticipating properties.

   The following table describes some of the fields in the Summary form.

Field	Comments
Total Profit	Total expected profit for the quote, which is the sum of function space profit, and room block profit.
Total Revenue	Total revenue for the quote, which is the sum of function space revenue, and room block revenue.
Total Square Feet	Sum of the actual square feet for each function space associated with the quote.
Refresh	When a change is made to a function line item or room block line item, the Refresh flag is checked to indicate to users that the Refresh button should be clicked for revenue recalculation and rollup.
Sleeping Room Profit	Sum of sleeping room profits for the quote, with each sleeping room profit calculated as sleeping room revenue multiplied by the profit percentage defined for the rental. `Sleeping Room Profit = Sleeping Room Price - Cost`
Total Room Nights	Sum of all contracted rooms associated with the quote.
Sleeping Room Revenue	Sum of the revenue for all sleeping rooms associated with the quote.
SR Availability	An aggregate inventory status for all the room block line items. Indicates sleeping room availability with one of the following values: ■ Total. All sleeping room line items associated with the quote are available for use. ■ Not Available. Sleeping room line items are not available for use. ■ Partial. Some sleeping room line items are available for use.
Function Space Room Rental	Sum of function space rentals for the quote.

Field	Comments
Function Space Revenue	Sum of function space revenues for the quote.
Function Space Profit	Sum of function space profit for the quote, with each function space profit calculated as function space revenue multiplied by the profit percentage defined for the rental. This is calculated from the rollup of revenue categories that have the Sum Line Item flag checked.
FS Availability	An aggregate inventory status for all the functions associated with a quote. Indicates function space availability with one of the following values: ■ Total ■ Not Available ■ Partial
Required Threshold	Sum of the threshold for each function space associated with the quote. For more information on threshold calculations, see Profit and Revenue Thresholds on page 407.
Threshold Profit Variance	Function space profit minus the required threshold value. If the value is negative, the quote did not pass the threshold. If the value is positive, the quote passed the threshold.
Total # of Covers	Sum of the expected number of attendees for all functions associated with the quote.

Reviewing the Quote Summary Revenue Thresholds List

The Quote Summary view's Revenue Thresholds list shows the overall revenue and profit associated with all of the functions by parent category, as well as the revenue variance by parent category. The revenue variance helps the sales representative determine how much more revenue the representative needs to generate in a particular parent category to meet the required threshold amount for the quote.

If you make changes to the revenue estimates at the category level, as described in "Changing Revenue Category Estimates" on page 282, then these changes are reflected in this view.

This task is a step in Reviewing Revenue Estimates for Quote Functions on page 276.

To review the Quote Summary Thresholds list

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quote list, query for and select the required quote.
3. Click the link in the Name field, and then click the Summary view.

4 Scroll down to the Thresholds list, and review the items in the list.

The following table describes some of the fields in the list.

Field	Comments
Parent Category	The parent category of functions and function line items.
Revenue	The revenue associated with the parent category.
Profit %	The profit percentage for the parent category. The Profit % for the category is defined by the administrator using the Property Pricing Admin screen.
Expected Profit	The expected profit for the parent category calculated by multiplying revenue by the profit percentage.
Revenue Variance	Shows how much more revenue the user has to produce in a particular parent category to meet the required quote threshold amount. This field is calculated by dividing the Threshold Profit Variance by the parent category's profit %.

Reviewing Quote Summary Negotiation Rates List

The Quote Summary Negotiation Rates list shows the negotiation rates associated with the room blocks. This list displays information similar to information displayed in the Negotiation Rates list within the Quotes screen's Room Blocks view. For more information, see Updating Negotiation Rates for a Quote on page 263.

This task is a step in Reviewing Revenue Estimates for Quote Functions on page 276.

Reviewing Quote Summary Functions List and Function Line Items List

The Quote Summary Functions list shows the functions associated with the quote. The information displayed in the Summary view is similar to the information found in the Quote Functions view.

Sales users can navigate to other relevant screens and views by clicking the field links within each function record. Table 17 describes the links, and the resulting destination when the links are clicked.

This topic is a step in Reviewing Quote Details on page 265.

Table 17. Function Record Links and Navigation Destination

Field Link	Navigation Result
Date	Function Space Diary screen > Sales/Execution Diary
Day #	Property screen > Total Availability view
Function Name	Functions screen > Line Items > More Info view

Table 17. Function Record Links and Navigation Destination

Field Link	Navigation Result
Function Type	Functions screen > Line Items > More Info view
Order #	Orders screen > Event Order > Functions view
Function Status	Quote > Time Shift > Function Shift view

The Function Line Items list displays summary information for all function line items associated with the quote. It is possible to add new line items to this list. For more information about summary line items, see "Managing Functions Associated with Quotes" on page 257.

Reviewing Quote Summary Room Blocks List and Room Block Line Items List

The Quote Summary Room Blocks list shows all rooms blocks associated with the quote. The list shows information similar to that displayed in the room block list within the Quotes > Room Blocks view.

The Quote Summary Room Block Line Items list shows the room block line items for the selected room block that is associated with the quote. This list displays information that is similar to the room block line items list within the Quotes screen > Room Blocks view. You can add new room blocks and line items to these lists. For more information, see Managing Event Room Block Information in Quotes on page 261.

This topic is a step in Reviewing Quote Details on page 265.

Reviewing Quote Discounts

Quote discounts may be applied to a quote in a number of different ways as follows:

- **Full Day Discounts.** For more information about setting up full day discounts, and how these discounts are applied, see Setting Up Full Day Discounts for Function Spaces on page 165.
- **Volume Discounts.** For more information, see Setting Up Volume Discounts on page 167.
- **Matrix Discounts.** For more information, see Setting Up a Matrix Series on page 170.
- **Manually Applied Discounts.** For more information, see Applying Discount Percentages to Quotes, Functions, Room Blocks, and Line Items on page 270 and Manually Applying a Negotiated or Discount Price to Line Items on page 271.

NOTE: In order for discounts to be applied to a product, you must make sure that the Disable Discount Flag for the product has not been selected. This can be done using the Administration - Product screen.

To review all quote discounts, for a quote, you must do the following:

- Applying Discount Percentages to Quotes, Functions, Room Blocks, and Line Items on page 270
- Manually Applying a Negotiated or Discount Price to Line Items on page 271
- Reviewing Function Discounts on page 272
- Reviewing Room Block Discounts on page 273
- Reviewing the Pricing Waterfall for Function Spaces and Sleeping Rooms on page 274
- Reviewing the Total Discount for a Quote on page 276

Applying Discount Percentages to Quotes, Functions, Room Blocks, and Line Items

You may apply a discount percentage to each line item, room block, function, and quote. Discounts are applied as follows:

- Line item discount percentages are only applied to line items.
- Function discount percentages are applied to functions and function line items.
- Room Block discount percentages are applied to room block and room block line items.
- Quote discounts are applied to quotes, functions, room blocks and line items.

If you apply a discount at each level, the line item discount is applied to the item first, then the function or room block discount is applied (as appropriate), and finally the quote discount is applied.

To apply a discount percentage to a function or its line items

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.

3 Click the link in the Name field, and then click the Functions tab.

4 In the Functions list, select the required function, and do the following as required:

- Enter an appropriate value in the Discount % field for the function.
- Scroll down to the Line Items tab, select the required function line item, and enter an appropriate value in the Discount % field for the line item.

To apply a discount percentage to a room block or its line items

1 Navigate to the Quotes screen > Quotes List view.

2 In the Quotes list, query for and select the required quote record.

3 Click the link in the Name field, and then click the Room Blocks tab.

4 In the Room Blocks list, select the required room block, and do the following as required:

- Enter an appropriate value in the Discount % field for the room block.
- Scroll down to the Room Block Line Items tab, select the required room block line item, and enter an appropriate value in the Discount Percent field for the line item.

To apply a discount percentage to a quote

1 Navigate to the Quotes screen > Quotes list view.

2 In the Quotes list, query for and select the required quote.

3 On the Quote form, click the Show More button, and scroll down to the Discount Information section of the form.

4 Enter an appropriate percentage value in the Discount field for the quote.

Manually Applying a Negotiated or Discount Price to Line Items

Pricing of function line items and room block line items is performed by an administrator. The administrator defines prices for function spaces, sleeping rooms and catering products. The administrator or event manager may also define negotiation rates for sleeping rooms. The administrator may also define discounts that are automatically applied to quotes. However, it is also possible to manually apply a negotiated price to function line items in a quote, and to manually apply a discount price to room block line items in a quote.

This task is a step in Reviewing Revenue Estimates for Quote Functions on page 276.

Applying a Negotiated Price to Function Line Items

In function line items for a quote, you can specify a negotiated price. For example, a customer may have special negotiated prices for certain event packages that can be reflected here. You can specify a negotiated price and also specify a discount percent or amount, independently of each other. This allows you to choose, item by item, whether or not to give a discount on top of a negotiated rate.

To apply a negotiated price to a function line item

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. Scroll down to the Line Items tab, and select the required function line item.
5. Enter an appropriate price in the Negotiated Price field.

   This negotiated price becomes the override price for the line item, and is rolled up to the revenue estimates.

Applying a Discount Price to Room Block Line Items

In room block line items for a quote, you can specify a discount price. If you enter a discount price, you cannot enter a discount percentage or a discount amount. The Discount Price, Discount %, and Discount Amount fields are mutually exclusive.

To apply a discount price to a room block line item

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. Scroll down to the Room Block Line Items tab, and select the required room block line item.
5. Enter an appropriate price in the Discount Price field.

   This discount price becomes the new price for the line item, and is rolled up to the revenue estimates.

Reviewing Function Discounts

Discounts may be applied to functions and line items through full day discounts, a matrix series, or by manually applying a discount to a function line item. For more information about full day discounts and matrix series, see Discount Pricing Administration on page 165. You can view the discount amount for each individual function line item and also the total discount for the function through the Quotes > Functions view. When you have viewed the discounts applied to a function and its line items, you can decide whether or not the discount is appropriate. If you want to manually apply a negotiated price instead of or in addition to a discount, see "Applying a Negotiated Price to Function Line Items" on page 272.

To view the discount amount for a function line item

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. In the Functions list, select the required function.
5. Scroll down to the Line Items tab, and select the required function line item.
6. Examine the value in the Discount Amount field.

   This value is the summation of all discounts that are applied to the individual line items plus the discount percentage applied to the function.

To view the total discount amount for a function

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. In the Functions list, select the required function.
5. Examine the value in the Total Discount field.

   This value details the total discount for all function line items including the discount percentage applied to the function.

Reviewing Room Block Discounts

Discounts may be applied to room blocks and line items through volume discounts, a matrix series, or by manually applying a discount to a function line item. For more information about volume discounts and matrix series, see Discount Pricing Administration on page 165. You can view the discount amount for each individual room block line item and also the total discount for the room block through the Quotes > Room Blocks view. When you have viewed the discounts applied to a function and its line items, you can decide whether or not the discount is appropriate. If you want to manually override all prices and apply a manual discount price, see "Applying a Discount Price to Room Block Line Items" on page 272

To view the discount amount for a room block line item

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. In the Room Blocks list, select the required room block.
5. Scroll down to the Room Blocks Line Items tab, and select the required line item.

6 Examine the value in the Discount Amount field.

This value is the summation of all discounts that are applied to the individual line items plus the discount percentage applied to the room block.

To view the total discount amount for a room block

1 Navigate to the Quotes screen > Quotes List view.

2 In the Quotes list, query for and select the required quote record.

3 Click the link in the Name field, and then click the Room Blocks tab.

4 In the Room Blocks list, select the required function.

5 Examine the value in the Total Discount field.

The Total Discount field is equal to the summation of the Line Items Discounts plus the Negotiation Rates discount.

Reviewing the Pricing Waterfall for Function Spaces and Sleeping Rooms

The pricing waterfall is a dialog box that you can use to examine how a line item has been priced or how the price has changed since the quote was generated. For example, if a sleeping room originally had a benchmark price of $150 dollars, and a discount amount of $20, then the waterfall shows the original price of the room and also the adjusted price ($130) of the room. This is also true of function spaces and catering products. This pricing waterfall dialog box allows you to view all adjustments made to a line item from the time that the quote was generated.

Figure 10 shows the pricing waterfall for a sleeping room. As you can see, the benchmark price for this room was $150, but the line item was manually adjusted to a price of $130. Volume discounts, full day discounts, matrix discounts, and any other price adjustments are displayed in the pricing waterfall for the appropriate line items.

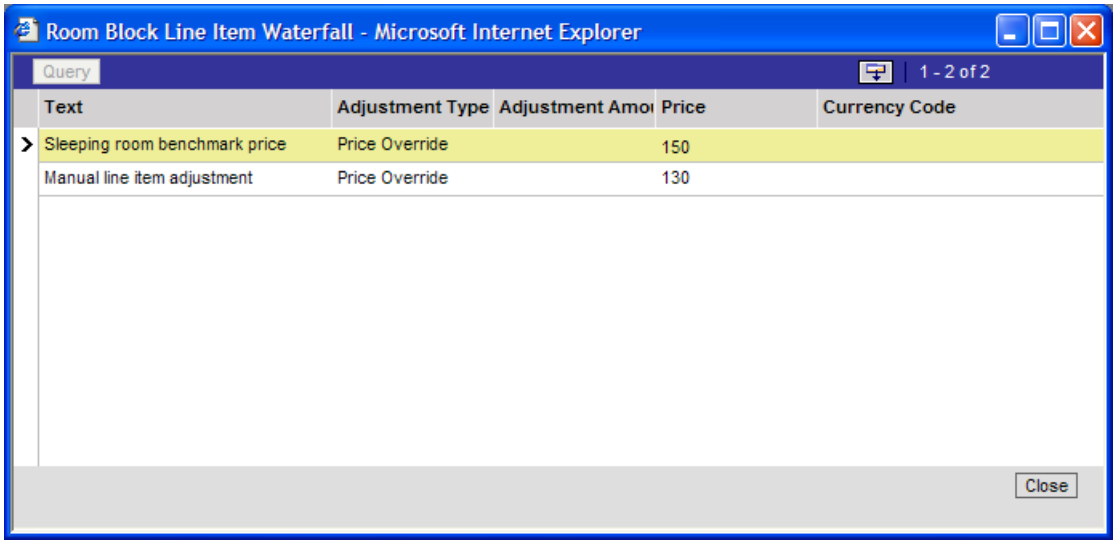


Figure 10. Pricing Waterfall for Sleeping Rooms

To view the pricing waterfall for function line items

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. Scroll down to the Line Items tab, and select the required function line item.
5. Click the link in the Unit Net Price field.

   The pricing waterfall for the selected line item is displayed.

To view the pricing waterfall for room block line items

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Quote # field, and then click the Room Blocks tab.
4. Scroll down to the Room Block Line Items tab, and select the required room block line item.
5. Click the link in the Single Price field.

   The pricing waterfall for the selected line item is displayed.

Reviewing the Total Discount for a Quote

The total discount for a quote is equal to the summation of all the discounts that are applied to functions and room blocks. This value can be used in conjunction with the quote revenue to see the value of the quote.

To view the total discount for a quote

1. Navigate to the Quotes screen > Quotes list view.
2. In the Quotes list, query for and select the required quote.
3. On the Quote form, click the Show More button, and scroll down to the Discount Information section of the form.
4. Review the value in the Total Discount field.

Reviewing Revenue Estimates for Quote Functions

The Functions Revenue Estimates view shows the estimated revenue for both the sum of the line items and the average values for the quote. Because function revenues are associated with parent categories for revenue rollup purposes, the revenue estimates appear according to parent category, but can be viewed by category by clicking the Expand All button.

Revenue estimates are not available for quotes associated with nonparticipating properties because pricing information for functions, room blocks, and their line items must come from the NPP. For more information about nonparticipating properties, see Chapter 21, “Managing Nonparticipating Properties.”

This section contains the following topics and is a step in Process of Managing Property-Specific Event Quotes on page 245.

- Reviewing Parent Revenue Category Revenue Estimates on page 276
- Changing Revenue Category Estimates on page 282

Reviewing Parent Revenue Category Revenue Estimates

Review the parent category revenue estimates from the Revenue Estimates view. Parent Category estimates take into account the revenue estimates for functions, their subfunctions, and child subfunctions. The section details how to review function revenue estimates, and also details how these estimates are calculated for functions with subfunctions.

Reviewing Function Revenue Estimates

When reviewing the revenue for function space rental, you may notice that the values contained in the fields may reflect a number of different function spaces. This is because the revenue totals for all active function spaces are reflected in this view. There may be more than one active space if you have switched from a function space to its backup spaces. For more information about switching, see Switching to the Backup Space on page 305.

This task is a step in Reviewing Revenue Estimates for Quote Functions on page 276.

To review function revenue estimates

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Name field.
4. Click the Functions view tab, and select the function in the list.
5. Scroll down, and click the Revenue Estimates view tab.
6. In the Revenue Estimates list, review the information.

   The following table describes some of the fields.

Field	Comments
Parent Revenue Category/ Revenue Category	The parent revenue category and revenue category with which function space revenues are associated.
Projected Revenue - Total	Defaults to the Average Value Total. The user can update the value after consulting with the customer during the quote process.
Projected Revenue Per Person	Displays the projected revenue per attendee. The Projected Revenue Total is divided by the Set number of attendees. If the Set number is unknown, then the Projected Revenue Total is divided by the Guaranteed number of attendees. If the Guaranteed number is unknown, then it is divided by the Projected number of attendees. If the projected number is unknown, then it is divided by the expected number of attendees.
Average Value Total	Shows the average value for a given function type or business type on the date of the function by parent category. This value is set by the revenue managers as a guideline.

Field	Comments
Average Value Per Person	Displays the average value per attendee. The Average Value Total is divided by the Set number of attendees. If the Set number is unknown, then the total is divided by the Guaranteed number of attendees. If the Guaranteed number is unknown, then the total is divided by the Projected number of attendees. If the Projected number is unknown, then the total is divided by the Expected number of attendees.
Line Item Expected Profit	Displays the expected profit for the sum of the line items. Calculated by multiplying Total Line Item Revenue by the profit percentage of that particular Parent Revenue category.
Total Line Item Revenue	Sum of the revenue for the line items including functions and subfunctions.
Total Line Item Revenue - Function	Sum of the projected revenue for the selected function.
Total Line Item Revenue - Sub Function	Sum of the projected revenue for all subfunctions associated with the selected function.
Per Person Line Item Revenue	Displays the line item revenue per attendee. Total Line Item Revenue divided by the Set number of attendees. If the Set number is unknown, then the revenue is divided by the Guaranteed number of attendees. If the Guaranteed number is unknown, then the revenue is divided by the Projected number of attendees. If the Projected number is unknown, then the revenue is divided by the Expected number of attendees.
Projected Profit	Displays the projected profit for the function. Calculated by multiplying the Projected Revenue Total by the profit percentage defined in the Property Pricing Admin screen > Profit Series view.
Service Charge	Displays the total service charges for the function.
Tax	Displays the total taxes for the function.

Overriding the Average Values for Subfunction Categories

During the initial setup of a property's average values, the revenue manager assigns average values to the various function types that exist at a property. The revenue manager uses past history to estimate the average revenue contributions associated with each function type.

During the opportunity capture stage, the sales representative may not fill in all information about a function, and may decide to keep the function details at a very high level. As a result, only the details of the main functions may have been added to the event agenda, and not subfunction details.

This means that when the sales representative decides to detail the function by adding subfunctions, the revenue contributions are added twice to the function. This is because some of the categories for the function may be added at both the function level initially and then at the subfunction level when the function is detailed. For example, a Meeting function may be added to an opportunity with an Audio Visual and Coffee Break revenue contribution. Later, the sales representative may decide that the Coffee Break should be added as a subfunction of the main function. In this case, the revenue contribution for the function has been added twice. In order to make sure that the revenue contribution is not mistakenly counted twice, an average value override for subfunctions has been put in place in Siebel Hospitality. This average value override is subject to a number of rules as follows:

- Rule 1: The subfunction category revenue estimate takes precedence over the estimate that exists at the parent function level.
- Rule 2: Multiple subfunction revenues of the same category are added together.
- Rule 3: The subfunction category revenue override facility overrides one function level higher than the level at which it exists.

The rules for function category average value overrides are illustrated in the following examples:

- Example 1: One main function that contains two subfunctions
- Example 2: One Main Function that Contains a Subfunction and a Child Subfunction of the Subfunction

Example 1: One Main Function that Contains Two Subfunctions

Table 18 provides the details of the main function.

Table 18. Main Function Details

Function Name	Function Type	Parent Category	Category	Revenue
Function 1	Meeting	Food	N/A	130
			Lunch	100
			Coffee Break	30

Table 19 provides the details of the first subfunction.

Table 19. First Subfunction Details

Function Name	Function Type	Parent Category	Category	Revenue
Subfunction 1	Coffee	Food	N/A	45
			Coffee Break	45

If the user indents Subfunction 1 under Function 1, then Rule: 1 applies; The subfunction category revenue estimate takes precedence over the estimate that exists at the parent function level. Table 20 shows the changes to Function 1 when Subfunction 1 is indented.

Table 20. Main Function Details After Subfunction is Added

Function Name	Function Type	Parent Category	Category	Revenue
Function 1	Meeting	Food		100
			Lunch	100
			Coffee Break	0

The Coffee Break revenue is overridden and is set to 0 at the parent function level. This means that the revenue estimate that is displayed at the quote level would be as shown in Table 21.

Table 21. Revenue Details at the Quote Level

Parent Category	Category	Revenue
Food		145
	Lunch	100
	Coffee Break	45

At this stage, the sales representative decides to add another subfunction to the parent function, Function 1. Table 22 shows the details of this subfunction.

Table 22. Second Subfunction Details

Function Name	Function Type	Parent Category	Category	Revenue
Subfunction 2	Meeting	Food		25
			Coffee Break	25

When this subfunction is added, Rule: 2 is applied; Multiple subfunction revenues of the same category are added together. This is shown in Table 23.

Table 23. Summation of First and Second Subfunctions

Function Name	Function Type	Parent Category	Category	Revenue
Subfunction 1 + 2	Meeting	Food	Coffee Break	70
Subfunction 1	Meeting	Food	Coffee Break	45
Subfunction 2	Meeting	Food	Coffee Break	25

The revenue estimate that is now displayed at the quote level is shown in Table 24.

Table 24. Revenue Estimate at Quote Level

Parent Category	Category	Revenue
Food		170
	Lunch	100
	Coffee Break	70

Example 2: One Main Function that Contains a Subfunction and a Child Subfunction of the Subfunction

Table 25 provides the details of the main function.

Table 25. Main Function Details

Function Name	Function Type	Parent Category	Category	Revenue
Function 1	Meeting	Food		130
			Lunch	100
			Coffee Break	30

Table 26 provides the details of the subfunction.

Table 26. First Subfunction Details

Function Name	Function Type	Parent Category	Category	Revenue
Subfunction 1	Coffee	Food		45
			Coffee Break	45

If the user indents Subfunction 1 under Function 1, then Rule: 1 applies; The subfunction category revenue estimate takes precedence over the estimate that exists at the parent function level. The revenue estimate that is displayed at the quote level would be as shown in Table 27.

Table 27. Revenue Details at the Quote Level

Parent Category	Category	Revenue
Food		145
	Lunch	100
	Coffee Break	45

The sales representative then decides to add a child subfunction to the existing function. The details of this child subfunction are shown in Table 28.

Table 28. Child Subfunction Details

Function Name	Function Type	Parent Category	Category	Revenue
Child Subfunction 1	Coffee	Food		25
			Coffee Break	25

Table 29 shows the changes to the Subfunction 1 when Child Subfunction 1 is indented.

Table 29. Main Function Details After Subfunction is Added

Function Name	Function Type	Parent Category	Category	Revenue
Function 1	Meeting	Food		0
			Coffee Break	0

Rule 3 is the applied: The subfunction category revenue override facility overrides one function level higher than the level at which it exists. The revenue estimate that is displayed at the quote level would then be as shown in Table 30.

Table 30. Revenue Details at the Quote Level

Parent Category	Category	Revenue
Food		125
	Lunch	100
	Coffee Break	25

Changing Revenue Category Estimates

When you have reviewed the parent category estimates, you may decide that you want to change the revenue estimates for individual categories in the parent category. You can perform this task by expanding all parent categories to view all categories, and changing the required category. Any changes made to categories are rolled up to the parent category, and are reflected in the Revenue Estimates view.

This task is a step in Reviewing Revenue Estimates for Quote Functions on page 276.

To change revenue category estimates

1 Navigate to the Quotes screen > Quotes List view.

2 In the Quotes list, query for and select the quote.

3 In the Quote record, click the link in the Name field.

4 Click the Functions view tab, and select the function in the list.

5 Scroll down, and click the Revenue Estimates view tab.

6 Click Expand All.

All parent categories are expanded, and categories are displayed underneath the appropriate parent category and are indented in a tree structure.

7 Select the required category record, make changes as necessary, and save the record.

The changes are rolled up to the parent revenue category for the quote.

Reviewing Macro Estimates for Quotes

Macro estimates are used to estimate the approximate value at the early stages of an opportunity. However, when function agendas and room blocks are attached to the opportunity, more accurate revenue estimates can be generated for the quote from the function and room block line items.

When a quote is generated from an opportunity, the Macro Estimates for the opportunity are transferred to the quote. Although Macro Estimates are generally defined at the opportunity stage, you can make changes to these estimates after the quote has been generated if more accurate information becomes available.

The forecasted revenue for a quote is derived from the revenue estimates for the quote. The forecasted revenue for a quote can be seen in the Quote Revenue field on the quote form. However, on occasion, you may want to override the revenue estimates and use the macro estimates to generate the forecast for the Quote Revenue.

Macro estimates are not available for nonparticipating properties, as pricing information must come from the NPP, rather than the organization that has created the opportunity. For more information about nonparticipating properties, see Chapter 21, “Managing Nonparticipating Properties.”

This task is a step in Process of Managing Property-Specific Event Quotes on page 245.

To review the macro estimates for a quote

1 Navigate to the Quotes screen > Quotes List view.

2 In the Quotes list, query for and select the required quote.

3 In the Quote record, click the link in the Name field.

4 Click the Macro Estimates view tab, review the estimates, and then make any changes necessary.

To use macro estimates for the Quote Revenue forecast

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, query for and select the quote.

3 Scroll down to the Quote form.

4 In the Revenue & Pricing Information section, select the Macro Estimates flag check box, and then save the record.

The Quote Revenue field is populated with the sum of all Calculated Total Revenues for the macro estimates.

Viewing the Quote Event Calendar

The Quote Event calendar provides a visual timetable of quotes in a calendar format. This calendar can be viewed in daily, weekly, or monthly format. As this calendar is a quotes calendar, the user must be a member of the Quotes team to be able to use it. Quotes are displayed in the calendar according to the arrival date of the customer. The Quote Event Calendar helps event managers allocate work and gives sales representatives a visual depiction of the customers scheduled to visit a property during a given period of time.

Event managers at certain properties may want to post paper printouts of calendars to inform the operations staff of upcoming events. The calendar may be printed from a Microsoft Word file to make sure that the calendar format is retained.

This task is a step in Process of Managing Property-Specific Event Quotes on page 245.

To view the Quote Event calendar

1 Navigate to the Quotes screen > Calendar view.

2 Select either the Weekly or Monthly view tab.

The Weekly calendar is displayed by default.

To print the calendar

1 Navigate to the Quotes screen > Calendar view.

2 Select the appropriate calendar view, and weekly or monthly calendar format.

3 Click Print.

4 The calendar is displayed in a secondary Calendar pop-up window, and the Print dialog box appears.

5 Print the calendar to a local printer.

Using Quote, Function, and Room Block Charts

Siebel Hospitality provides you with the ability to analyze quotes, functions and room blocks using a variety of different chart formats including pie charts and bar charts. Quotes, functions, and room blocks at all stages can be viewed as charts. Information can include definite, lost/turndown, canceled, T1/T2, prospects, actualized, recurring, and host/affiliate quotes, functions, and room blocks.

This task is a step in Process of Managing Property-Specific Event Quotes on page 245.

To display charts that analyze quotes

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for the records that you want to analyze in a chart.
3. Click the Charts link.
4. From the Charts view, select the chart type that you want to view from the list.

   For example, you could select the Account Analysis, Account Discount Analysis, Rep Discount Analysis, Status Analysis by Rep, Room Block Analysis, or Quote Property Analysis chart.
5. From the Chart Format drop-down list, select the format in which you want to view the analysis.

   For example, you could select 3dBar or 3rd Pie, and so on.

To display charts that analyze functions

1. Navigate to the Functions screen > Function List view.
2. In the Functions list, query for the records that you want to analyze in a chart.
3. Click the Chart link.
4. Select either the Function Status In Time or Function Type Analysis chart tab.

   For the Function Type Analysis chart, you can view the chart for either Group or Local Business.
5. Select the frequency (day, week, or month) of the functions from the By: list.
6. Select the chart format.

   For example, you could select 3dBar, 3d Stacked Bar, and so on.

To display function revenue analysis charts

1. Navigate to the Functions screen > Function List view.
2. In the Functions list, query for the required function.
3. Click the link in the Name field, and then click the Revenue Analysis view tab.
4. Click either the Revenue Category or Parent Revenue Category link as required.

5 Select the chart format from the drop-down list.

For example, you could select 3dBar, 3d Stacked Bar, and so on.

To display charts that analyze room blocks

1 Navigate to the Room Blocks screen > Room Blocks List view.

2 In the Room Blocks list, query for the records that you want to analyze in a chart.

3 Click the link in the name field, and then click the Room Type Analysis view tab.

4 From this Charts view, select the chart type that you want to view from the list.

For example, you could select the Room Type Analysis, Blocked, Picked Up, or Total Group Available chart.

5 Select the chart format from the drop-down list.

For example, you could select 3dBar, 3d Stacked Bar, and so on.

6 Select the frequency (day, week, or month) of the functions from the By: list.

7 Click Go.

The required chart is displayed.

18 Working with Inventory

This chapter includes information that can be used and procedures that can be performed when working with hospitality inventory. It includes the following topics:

- Process of Working with Event Inventory on page 288
- Management of Function Characteristics at the Opportunity Stage on page 288
- Management of Room Block Characteristics at the Opportunity Stage on page 289
- Management of Property Characteristics at the Opportunity Stage on page 290
- Quote Generation Processes on page 290
- Function Space Reservation on page 291
- Management of Functions at the Quote Stage on page 291
- Management of Functions That Require Backup Space on page 302
- Management of Room Blocks at the Quote Stage on page 306
- Background Processes at the Quote Level on page 314
- Changing Attributes Critical to Inventory Reservation on page 314
- Actualizing a Function on page 317
- Time Shifting Event Functions and Room Blocks on page 318
- Checking Inventory Availability Using Property Screen Views on page 322

Process of Working with Event Inventory

This topic lists the tasks typically performed by event managers when managing inventory for an event. Your company may follow a different process according to its business requirements.

To manage inventory for an event, perform the following procedures:

- Management of Functions at the Quote Stage on page 291
- Management of Functions That Require Backup Space on page 302
- Management of Room Blocks at the Quote Stage on page 306
- Management of Functions That Require Backup Space on page 302
- Changing Attributes Critical to Inventory Reservation on page 314
- Actualizing a Function on page 317
- Time Shifting Event Functions and Room Blocks on page 318
- Checking Inventory Availability Using Property Screen Views on page 322

Management of Function Characteristics at the Opportunity Stage

The sales representative can use a number of function parameters to manage and detail functions at the opportunity level. Management at the opportunity level typically occurs before the sales representative associates properties with the opportunity and generates quotes.

Noise Flag

The Noise flag indicates that a particular function may generate a lot of noise which can inconvenience other guests at the property. The noise flag helps sales representatives identify noise-producing functions and manage other functions that occur during the same time.

Spacious Set Flag

At the opportunity stage, the user can create a new function (or edit an existing function), specify the setup style and expected number of attendees, and then set the Spacious Set flag. During the create quote process, the Best Fit step takes the Spacious Set flag into account when reserving a function space. See Flagging a Function for Spacious Set on page 301 for more information.

Bypass Flag

The Bypass flag allows the sales representative to bypass the best-fit step of the create quote process for functions requiring very specific locations. Instead, the sales representative can select the function space at the quote stage.

Best Fit Suite Only Flag

The Best Fit Suite Only flag is used to book suites as function spaces. The sales representative sets the Best Fit Suite Only flag so that only suite function spaces are selected during the create quote best fit process.

Feature

The Feature drop-down list is used to specify particular product features, which the create quote best fit process must take into account when selecting the most appropriate function space for the booking. See Creating Function Space Product Features for the Opportunity Screen's Function Agenda on page 93 for more information.

Subfunctions at the Opportunity Stage

The sales representative can build a hierarchy of functions and subfunctions at the opportunity level. For example, a board meeting function takes place for the entire business day in which smaller breakout sections are held, such as a coffee break and dinner. These breakout sessions, which occur throughout the board meeting, are defined as subfunctions under the Board Meeting Function record. See Detailing a Function on page 298 for more information.

Management of Room Block Characteristics at the Opportunity Stage

During the opportunity capture process, the sales representative can add detailed information about room blocks and room block line items. Room block line items represent the sleeping room types that are booked as part of a room block. One of the attributes that characterizes the room block line item is the room block type. The user can select only generic sleeping rooms at the opportunity stage. The administrator creates the generic sleeping room line items using the Product Administration screen. There are several types listed under the Room Type field, including:

- Generic Standard
- Generic Deluxe
- Generic Suite
- Generic Upgrade

During the create quote process, the system maps the generic room type to the property's sleeping room. This mapping process uses generic room block records, and each generic room block record has a list of actual property sleeping rooms associated with it. For more information about creating generic room block records, see Creating Generic Room Blocks on page 87, Adding Room Block Information to an Event Opportunity on page 208, and Mapping Generic Room Blocks to Property-Specific Room Types on page 89.

Management of Property Characteristics at the Opportunity Stage

There are several property attributes that affect how the quote records are handled during the generate quote process. Two such attributes are the NPP flag (Non Participating Property flag) and the Bypass flag. When either of these two attributes flags set for property records, the system skips the best fit and pricing steps during the create quote process.

Nonparticipating properties are identified as properties that do not use the Hospitality Event Sales, Execution or Function Space Inventory processes. The function spaces and sleeping rooms in nonparticipating properties, however, can still be sold by a member of the Brand and National Sales Center.

Similar to the function's Bypass flag attribute, the Bypass flag that is set in the Opportunity Property record indicates that the best fit step should be suppressed for all functions records associated with that property record. After the quote is generated, the sales representative can manually assign specific function spaces to the quote's functions. For more information about associating property records with an opportunity, see Selecting Properties for the Event Opportunity on page 213.

Quote Generation Processes

Based on the function, room block, and property information captured at the opportunity level, an automated process is triggered to generate quote records for each property associated with the opportunity record. The Generate Quote process takes many factors into account when generating quote records that meet all the specified requirements.

The Generate Quote process invokes the following inventory and pricing subprocesses:

- Function Space and Suite Best Fit Reservation
- Sleeping Room Reservation
- Mapping generic products to property specific products
- Calculating the room rental price of function space
- Calculating the quote threshold value

The application uses attributes such as the Bypass and Non Participating Property flags to determine which subprocesses are launched for the agenda created during the opportunity capture stage. For example, the Bypass flag set on the property record suppresses several subprocesses including function space reservation.

It is critical that the sales representative validates each attribute on the Function, Room Block, and Property records. These attributes dictate which automated subprocesses are launched during the generate quote process.

Function Space Reservation

The function space reservation process uses a combination of attributes to select and reserve a function space. During the sales and event execution processes, users invoke methods to check for function space availability. During the availability checks, the system determines if the function space can be reserved by examining the existing reservations, effectivity dates, predefined authorization levels, and function space configurations for the time and space requested.

When the user changes certain attributes (for example the start time) that can affect the inventory, the system automatically prompts the user to verify that the function space is available with the changed attributes. For more information, see Inventory Critical Fields at the Function Level on page 315.

Management of Functions at the Quote Stage

The sales representative can manage function details for a quote using the quote's Function and Line Items views, or by navigating to the Functions screen and querying for the function in the Functions list.

In addition to updating function field information, the user can perform a number of tasks from these screens and views by using the following functionality:

- **Reserve and Next Fit.** For more information, see Using Reserve and Next Fit to Hold Function Space on page 291.
- **Option.** For more information, see Optioning Function Space on page 292.
- **Overbook.** For more information, see Overbooking Function Space on page 293.
- **Cancel.** For more information, see Canceling a Function on page 293.
- **Copy.** For more information, see Copying a Function on page 294.
- **Reprice and Reprice All.** For more information, see Function Line Item and Revenue Data Repricing on page 409.
- **Refresh.** For more information, see Function Line Item and Revenue Data Repricing on page 409.

Using Reserve and Next Fit to Hold Function Space

The sales manager can use the Reserve button on the Quote Function view to reserve a specific space or category. The manager uses the Next Fit button to find available function space that meets the event requirements.

Reserve

The Reserve button is typically used under the following conditions:

- If availability checks for the function were bypassed at the opportunity stage, the user updates the availability information in Quote screen's Functions view. This update includes any changes to information about the function space, setup style, expected number of attendees, date, start time, and duration of the event. The user then clicks Reserve to hold the function space, if available.
- If the user adds a new function to the quote, selects a function space, and completes the rest of the fields for the function record. The user then clicks Reserve, and the specific space, if available, is reserved.
- If the user wants to change the function space category or specific space, the user can select a different function space and then click Reserve to launch the availability check for the new function space.
- If a quote has been generated from a nonparticipating property, this button initially changes the value in the Inventory Status field from a null value to Reserved. The user can then use the button to toggle between Reserved and Unreserved as information is supplied from the NPP.

Next Fit

When the Next Fit button is clicked, the best available function space (based on number of attendees, setup style, any specified features, and physical area specified in the function) is selected, and the inventory status is Reserved.

For example, after an opportunity is created and a quote generated, the user reviews the function space availability in the Quote screen's Function view. At this point, the user clicks Next Fit to launch the process of finding and reserving the best available function space.

NOTE: Users can only click the Next Fit button if a function space has not already been selected and reserved for the function.

In some circumstances, the Next Fit process may not locate any available spaces. In this case, the system returns the best-fit function space with a status of Unreserved.

NOTE: The user cannot use the Next Fit option when managing NPPs.

Optioning Function Space

When the authorization level value for the function space is reached, the user can maintain an option on the function space in case a cancellation occurs. The *authorization level* is an inventory control for the function space, which allows the administrator to specify a value for the number of times the function space can be booked. This value is usually set higher or equal to the capacity level. For more information about defining authorization levels, see Chapter 8, "Setting Up Inventory Controls."

The function space can be optioned as many times as allowed by the option limit. The option limit is entered as part of the inventory control setup.

The Option button can only be used when the inventory status is unreserved, or when no status appears for the inventory. During the process of optioning function space, users can select multiple functions and click the Option button. Each time Option is used, a new availability check is launched.

If the function space is available because of a cancellation, then the function space is reserved. If the function space is not available, then the inventory status is set to Optioned.

If the function space becomes available, then the following actions occur:

1. The optioned function holds the function space.
2. An email is generated and sent to the owner of the quote. The quote owner with the option must reserve the function space within three hours.

NOTE: The time stipulation can be configured using the TNT SHM Optioned Booking Expiry workflow. When the time has been changed, the workflow must then be redeployed. See Hospitality Workflow Processes on page 29 for more information.

3. The inventory status changes from Optioned to Option Reserved.
4. If the sales representative does not respond within the stipulated time, then the Option Reserved inventory status changes to Unreserved.

   When the inventory status changes to Option Reserved and the function space selected is a specific space, the sales representative can choose to accept the option. To accept the option, click the menu button in the Function Space list, and select Accept Option button. The inventory status changes to Reserved.

NOTE: Users cannot option function space when managing NPPs.

Overbooking Function Space

If the function space authorization level has been reached, the user can choose to overbook the function space, overriding the authorization level. The function space can be overbooked as many times as allowed by the overbook limit. The overbook limit is entered as part of the inventory control setup.

If the function space is available because of a cancellation, then the function space is reserved. However, if the function space is still not available, then the inventory status is changed to Overbooked. A new availability check is launched each time the user clicks Overbook. If the function space becomes available, then the overbooked function automatically becomes reserved.

NOTE: If an optioned and overbooked function exist and function space become available, the overbooked function receives first priority.

Canceling a Function

If plans change and an event no longer includes a particular function, an event manager can cancel the function using the Function screen's More Info view or from the Quotes screen's Functions list.

Canceling the function automatically releases single asset bookings for the function, critical and noncritical assets, as well as other inventory such as the function spaces. If an asset is double-booked, the second request for the asset remains in the system but does not automatically convert to a regular booking. The record for a canceled function remains in the system along with its line item, but the function is not included on a Schedule of Events (SOE), and its line items do not appear on an invoice.

To cancel a function

1. Navigate to the Quotes screen > Opportunities List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Quote Name field.
4. In the Functions list, select the required function, click the menu button, and then click Cancel Function.

   The function status is changed to Cancel and the inventory associated with the function is released.
5. Enter the reason for the function cancellation, and save the record.

NOTE: The Cancel Function option cancels both parent functions and subfunctions. It also cancels both primary and backup function spaces.

Using the Function Space Inventory Buttons on Backup Spaces

The inventory buttons—that is, Reserve, Option, Overbook, and Next Fit, on the Quotes List > Functions > Function Space view tab—can be used on backup and active spaces. However, these inventory buttons on the Quotes List > Functions view tab only apply to primary active spaces.

The Reprice and Reprice-all buttons take backup spaces into account when calculating revenue totals.

Users can use inventory buttons on backup function space only if the primary function space for the function has been either reserved, overbooked, or optioned. This is because there is no point in holding backup space if the primary space has not been held for use.

Releasing function space inventory for the primary space after switching to a backup space has no effect on the inventory for reserved, optioned, or overbooked backup space.

Copying a Function

The user can copy a function from the Quote Functions and the Functions More Info view. When a function is copied, the user can specify the function details to copy, such as number of days, number of copies per day, and whether to copy subfunctions.

Users can also copy a function to quotes with the same property and quotes with a different property. If a user copies a function to a quote with a different property, the best fit process is launched to find a function space.

When a user copies a function to a quote with a different property, the function line items are initially mapped to the generic product. A property-specific product is then selected from the new property. If there is no such product, the generic line item is copied. If no mapping between the original line item and the generic line item can be performed, the line item is not copied.

Also, when users copy a function with line items and change the date, the system verifies whether the item is still available by checking catalog visibility. If the item is not available, it is not copied.

To copy a single function

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required opportunity record.
3. In the Quote record, click the link in the Name field.
4. In the Functions list, select the required function and click Copy.
5. In the Copy Function form, complete the fields, and then click Copy.

   The following table describes some of the fields.

Field	Comments
Quote #	The number of the quote with which the function is associated.
Order	The order with which the function is associated (if any).
Date	The date on which the function is due to be held.
# of Days	The number of days for which this function should be copied. For example, if you enter 2 to this field, a copy of the function is made for the date specified in the Date field, and a copy is made for the date following the date specified in the Date field.
Start Time	The time at which this function is due to commence.
Duration	The duration in minutes of this function.
Day #	The day number of the function.
# of Copies/Day	Specify the number of copies of the function to be made per day. For example, if you enter 2 to this field, copies of the function are made for every day specified in the # of Days field.
Subfunctions	If you select this field, all subfunctions associated with this function are copied to the new function or functions.

Field	Comments
Line Items	If you select this field, all line items associated with this function are copied to the new function or functions.
Backup Spaces	If you select this field, all backup spaces associated with this function are copied to the new function or functions. For more information about backup space, see Management of Functions That Require Backup Space on page 302.

Understanding Function Status Values

The status of a quote and its associated function changes throughout the sales cycle. The quote and function statuses are defined by the administrator and affect inventory business logic. Table 31 describes quote and function status values, and the corresponding Inventory states.

Table 31. Function Status and Inventory State

Status	Description	Inventory State
Prospect	Represents an initial inquiry by a customer (opportunity). Inventory may or may not be protected depending on whether a reservation request has been initiated.	Potentially holding
Hold	Represents a quote that has secured inventory for a short period of time.	Holding
T2 (Tentative 2)	Represents a quote that has secured inventory. This state is initiated by user action. A verbal Definite has been granted, but a contract has not been sent to the client.	Holding
T1 (Tentative 1)	Represents a quote that has secured inventory. This state is initiated by user action. A verbal Definite has been granted, and a contract has been sent. The sales representative is awaiting the signed contract.	Holding
Definite	Represents customer acceptance by means of a signed contract.	Holding
Lost/Turned Down	Represents a quote that is rejected. Inventory is not held.	Cannot hold inventory

Table 31. Function Status and Inventory State

Status	Description	Inventory State
Cancel	Represents a quote that has been declined after initial customer acceptance. Inventory becomes available for sale.	Cannot hold inventory
Actual	Represents an event that has been executed and inventory used. Only functions that have already taken place have this status. The booking remains in the system as an *actual* booking.	Holding

Assigning a Function to a Specific Space

Users can assign a function to a specific space using the Quotes screen's Functions > Function Space view. When the function is being assigned to a specific space, the system checks any values that are entered for Feature, Suite, Room Area, Setup Style, and Expected Attendees. The specific space within the selected category, which meets the requirements, is selected for the function.

To assign a function to a specific space

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Functions list, query for the function record.
5. Click the Function Space view tab.
6. Create or select a function space record, choosing a category as the function space value.
7. Reserve the function space by clicking the Reserve button.

   NOTE: If you do not reserve the function space, the Assign Specific Space option on the menu button remains unavailable.

8. Click the menu button, and select Assign Specific Space.
   - If a specific space that meets all the requirements is available, the category value changes to a specific space for the booking. The specific space selected will be one of the spaces belonging to the category.
   - If no such specific space is currently available, the following message appears, and the function remains assigned to a category:

     `No specific space is available for assignment. This may be because of invalid function space/setup style combination, invalid function space/feature combination, authorization beyond capacity or function space effective dates.`

Detailing a Function

Customers often block a large, configurable function room in which multiple, smaller breakout sessions are held. When the space is initially blocked, the detailed agenda of the breakout sessions is typically not known, and the space is blocked with a high-level agenda consisting of large contiguous blocks of time. As the event date approaches, sales users or event managers create detailed subagendas in smaller time increments for the breakout sessions (within the original function's start and end dates), apportioning the larger function space that was already blocked.

NOTE: Normal functions (with no detail flag checked) can only have two levels of hierarchy—function and subfunction. However, detailed functions can have three levels: function, subfunction, and sub-subfunction.

The sales representative can book the detailed agendas into space that is already held without double-booking the inventory by creating subfunctions for a Detail function. For a subfunction, the Function Space field is editable because it is positioned under a function that is being detailed. Only function spaces included in the parent function space are listed for selection. In addition, when a function becomes a subfunction, its date and time become constrained by the parent function's date and time. This means that the subfunction should have the same date as its parent function and its start and end times must be within the parent's start and end times. It also loses previously held inventory.

Users can create a child subfunction, known as a breakout function, for a subfunction. However, they cannot select a function space for this child subfunction.

When the detailing is complete, users can select the parent function and then click Detail Out from the menu. All subfunctions become established functions, and breakout functions become established subfunctions. The parent function is deleted.

Sales representatives can create a function with the Detail flag checked using the Quote screen's Function view as long as the function is not a subfunction. This capability is available for both category and specific space functions.

NOTE: If a sales representative selects the Detail flag on a function and reserves it, the representative is not able to clear the flag until the function is released. Also, the representative is unable to change the primary function space for the function, while the Next Fit, Option, and Overbook buttons are disabled.

If sales representatives create a function and select a category as the Function Space value, they cannot select and reserve a function space for the subfunction. However, if they select a specific space, they can select a function space for the subfunction which is related to the detailed parent record. For example, if a user has selected Salon AB for the detailed parent function, that user must select either Salon A or Salon B for the subfunction.

Sales representatives can reserve a subfunction's function spaces if the primary function space for the parent function has been reserved. If a parent function's primary function space is released, all of the subfunctions' function spaces are also released.

Buttons Used for Detailing Functions

Before creating subfunctions, locate the following buttons listed in Table 32.

Table 32. Buttons Used to Detail Functions

Button	Description	Usage
	Gray rectangular button with a navy arrow pointing to the right.	Used to demote the function by one level in the detailed function hierarchy.
	Gray rectangular button with a navy arrow pointing to the left.	Used to promote the function by one level in the detailed function hierarchy.
	Gray elliptical button with a navy arrow pointing upwards.	Used to move the function up the function list.
	Gray elliptical button with a navy arrow pointing downwards.	Used to move the function down the function list.

The following steps assume that a function with the Detail flag already exists in the Quote Functions list. Although detailing is typically done at the quote level, users can also create a hierarchy of functions within the opportunity and select the Detail flag at that stage.

This task is a step in Process of Working with Event Inventory on page 288.

To create a subfunction

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Quote Functions list, verify that a function record exists with the Detail flag selected and an Inventory Status of Reserved.
5. In the Functions list, add another record, and complete the fields.
6. Use the Move up and Move down buttons to position the record below the detail function.
7. Click the Demote one level button to make the new function a subfunction of the parent detail function.
8. Select a function space for the subfunction and click Reserve.
   - If you have selected a specific space for the parent function, you can also reserve a specific space for the subfunction. Only spaces related to the parent function space are available for selection.
   - If you have selected a category for the parent function, you cannot reserve a specific space for the subfunction.

After the parent function and subfunction are reserved, the user can click the link in the function record's Date field to navigate to the Function Space Diary. In the diary, only the parent function record is displayed. However, after the user selects Detail Out from the Functions view tab's menu button, the subfunction becomes an established function and is displayed in the diary. The parent function is no longer displayed.

To create a child subfunction for a subfunction

1. In the Functions list, add a record and complete the fields.
2. Use the Move up and Move down buttons to position the new record below the previously created subfunction.
3. Click the Demote one level button twice to make the record a child subfunction of the first subfunction record created.

   NOTE: Users cannot reserve a function space for a child subfunction.

To complete the detailing of a function

1. In the Functions list, select the parent Detail function.
2. Click the menu button, and choose Detail Out.

Suite Booking for Functions

The sales user can book a suite for a function using the Quote Functions view by selecting the Best Fit Suite Only flag in the function record and then clicking Next Fit to only return specific spaces of type suite or suite category.

The user can also select a specific space suite or a suite category by clicking the select button in the function record's Function Space field and then clicking Reserve.

As with other specific spaces, the user can option suite-specific space by clicking Option, and Overbook the suite space by clicking the menu button and choosing Overbook.

After booking a suite, the user can click the link in the function record's Date field to navigate to the Function Space Diary.

Inconsistent Setup Styles and Function Space

When working with quote functions, the user may select an inconsistent setup style and function space combination. This inconsistency typically occurs when a setup style has not been created for the selected function space.

When the user attempts to save the combination, a message appears alerting the user that the combination of function space and setup style are inconsistent, and the record is not saved.

Unit of Measure Conversions for Function Space Area

Using the Quote Functions view, the user can create a function and enter the area information in either square feet or square meters. If the user enters a value in either the Room Area (Sq. Ft.) field or the Room Area (Sq. M.), the value for the other field is automatically calculated. This conversion is also performed on the Opportunity > Function Agenda view.

Flagging a Function for Spacious Set

A customer may request a larger space for the function than is typically allocated based on the number of expected attendees. For example, a customer might want to hold a function that includes a dance. The expected number of people for the function may suggest a smaller room be booked; however, if a dance is planned, a more spacious function set is required.

This requirement can be met by setting the spacious set flag at the following levels:

- Opportunity stage
- Quote stage

At the quote stage, the user can create a new function (or modify an existing function), specify the Setup Style, remove the room area requirements and the value in the Function Space field, select the Spacious Set flag, and then click Next Fit.

When the Next Fit process is launched with the Spacious Set requirement, the system multiplies the expected number of attendees by 1.5. The resulting number is then used in the Best Fit/Next Fit algorithm. See Next Fit on page 292 for more information about the Next Fit process. The value for Spacious Set can be configured, and is only applicable for an availability check. Changes to this flag after function inventory is reserved have no effect.

It is possible to configure the multiplier that is used for the Spacious Set flag. Perform the steps in the following procedure to adjust the multiplier value.

To configure the Spacious Set flag multiplier

1. Log into Siebel Tools as an administrator.
2. In the Object Explorer, navigate to Business Component.
3. Query for the TNT SHM Function.
4. Navigate to Business Component > Business Component User Prop.
5. Query for the Spacious Set Multiplier.
6. Under Value, enter the new multiplier value.
7. Recompile the SRF.
8. Restart the client.

Management of Functions That Require Backup Space

There are two ways in which function spaces can be mapped to different functions:

- **Using the Best Fit/Next Fit process.** The Best Fit/Next Fit process is performed on the basis of information captured during the opportunity stage and a function space is automatically selected. For more information about Best Fit, see About Property-Specific Quotes on page 242.
- **Manually adding a new function space.** You can manually add a new function space to the quote if necessary. For more information about manually adding function spaces, see Adding Functions and Function Line Items to a Quote on page 258.

When you add a new function space to a quote you need to determine whether or not it requires backup space. This is determined by examining the read-only Back Up Required field for the function or function space. If this flag is checked, you should add extra backup spaces as required.

NOTE: You cannot delete the Active Primary space for a function. If you want to delete the active primary space for a function, you must make another space the active primary space, and then delete the space that is no longer the active primary space.

This task is a step in Process of Working with Event Inventory on page 288.

To manage functions that require backup, you must do the following:

- Identifying Function Spaces That Require Backup Spaces on page 302
- Adding Backup Spaces to a Function on page 303
- Understanding Booking Types for Function Spaces on page 305
- Switching to the Backup Space on page 305

Identifying Function Spaces That Require Backup Spaces

The following procedure describes how to identify function spaces that require backup spaces following automatic addition by the Best Fit process. For more information about Best Fit, see About Property-Specific Quotes on page 242.

This task is a step in Management of Functions That Require Backup Space on page 302.

To identify function spaces that require backup spaces and have been added by the Best Fit process

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the quote record, click the link in the Name field.
4. In the Functions list, select the function.

5 Examine the read-only Back Up Required field.

If this field is checked, then the function space associated with this function requires a backup space.

6 Scroll down, and click the Function Space view tab.

7 Examine the Back Up Required field for the function space.

This field is automatically selected if the Back Up Required field is selected for the function.

The following procedure describes how to identify function spaces that require backup spaces after you have manually added the function space as line items to a function. For more information about manually adding function line items, see Adding Functions and Function Line Items to a Quote on page 258.

To identify function spaces that require backup spaces following manual addition of the function space

1 Navigate to the Quotes Screen > List view.

2 In the Quotes list, query for and select the quote.

3 In the quote record, click the link in the Name field.

4 In the Functions list, select the function.

5 Scroll down, and click the Function Space view tab.

6 Examine the Back Up Required field for the function space.

If this field is checked, then the function space requires a backup space.

Adding Backup Spaces to a Function

When you have identified a function space that requires a backup, you can add an extra space to the function, and reserve it for use for the particular function. You may add as many backup spaces as you want for a function space that requires backup space. This capability may provide the customer with a greater amount of choice if it is not possible to hold the function in the space that requires backup space.

This task is a step in Management of Functions That Require Backup Space on page 302.

To add a backup space to a function

1 Navigate to the Quotes Screen > Quotes List view.

2 In the Quotes list, query for and select the required quote record.

3 In the quote record, click the link in the Name field.

4 In the Functions list, select the function.

5 Scroll down, and click the Function Space view tab.

6 In the Function Spaces list, create a new record, complete the fields, and save the record.

The following table describes some of the fields.

Field	Comments
Primary	Indicates whether or not this space is the primary space for the function. This field is used if a number of function spaces of booking type Active have been added for the quote. The primary function space appears in the Function Space field of the function. Do not select this field for a backup space.
Function Space	Select a function space that you wish to add as backup to the primary function space. Before choosing a function space, you may need to set the Booking Type field to Backup. This precaution prevents any function spaces that require backup from being displayed in the selection dialog box.
Back Up Required	Indicates if a backup space for this backup space is required. This field is a read-only and its value is taken from the function space chosen.
Booking Type	Select Backup. Active is selected by default.
Inventory Status	Indicates whether or not the inventory for this function space has been reserved.
Set-up Style	This field is automatically populated with the same setup style as the primary function. Users can change this value as appropriate.
Setup Durations Minutes	This field is automatically populated when the Function Space field is completed.
Teardown Duration Minutes	This field is automatically populated when the Function Space field is completed.
Function Space Parent Name	The category to which the space belongs. This field is automatically populated when the Function space field is completed.
Function Space Usable Area	Usable area for the function space. This field is automatically populated when the Function Space field is completed.
Property Unit of Measure	The Unit of Measure used with the property to which the function space belongs. This field is automatically populated when the Function Space field is completed.

NOTE: It is also possible to add a backup space using the Function Space multi-value group field for the function in the Functions list.

To reserve a backup space

1 In the Function Spaces list, select the required backup space.

2 Click Reserve.

The backup space is reserved.

NOTE: You cannot reserve a backup space for a function unless one of the active spaces for the function has been reserved. Also, if you unreserve all active spaces, all backup spaces also become unreserved.

Understanding Booking Types for Function Spaces

When you add a new function space, the default Booking Type is Active. The type that is selected in this field is important because it drives other functionary for the function. The effects of the Booking Type are:

- Only the rental price of active function spaces is taken into account for the quote price. Therefore, the rental price of a backup or switched space is not rolled up to the Quote Revenue. The customer is not charged for both the primary function space and the backup space. However, if a customer was to add an extra Active space instead of a backup space, then the user would be charged for both active function spaces.
- Threshold calculations are only performed for active function spaces. Backup and switched spaces do not contribute to the threshold calculations. However, if there are more than one active function spaces, then threshold calculations for all active spaces are performed.
- If the function space is either of type Backup or Switched, then function space is not added as a line item in the Function Line Items view. Only active function spaces appear in this view.
- If the Booking Type field is changed, the Need Refresh flag for the function is checked. This means that the function should be repriced, as the price of the functions may have changed.
- Function Spaces of booking type Active are added as line items to BEO and SOE reports. For more information on these reports, see Chapter 28, “Creating Hospitality Reports.”

This topic is a step in Management of Functions That Require Backup Space on page 302.

Switching to the Backup Space

Before the function begins, the event manager may decide to switch from the original function space to the backup space. This switch causes two booking-type changes:

- The booking type of the active booking space changes to Switched.
- The booking type of backup function space changes to Active.

When you switch the active and backup functions spaces, their booking types are updated accordingly, as is the pricing information for the function line items. Inventory for the previously active functions spaces is also released.

This task is a step in Management of Functions That Require Backup Space on page 302.

To switch to the backup space for a function space

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the quote.
3. In the quote record, click the link in the Name field.
4. In the Functions list, select the function.
5. Scroll down, and click the Function Space view tab.
6. In the Function Spaces list, select the primary function space, and click Switch.

   A dialog box appears, prompting you to either Retain Rental or Clear Rental for the active function space.
7. Click the appropriate button to make the switch you want:
   - If you want to switch to the backup space and also retain room rental information for the primary function space, click Retain Rental.
     - The Item name in the Line Items view remains the same as does the room rental information.
     - The rental information for the backup space is not shown.
   - If you want to switch to the backup space and also clear room rental information for the primary function space, click Clear Rental.
     - The Item name in the Line Items view changes to the name of the backup space.
     - The rental information for the backup space is shown.

   After you click the choice you want, the booking type of all active function spaces changes to Switched, and the booking type of all backup function spaces changes to Active. Inventory for the previously active function spaces is released.
8. Reserve function space inventory for the newly active function spaces by selecting the function space, and clicking Reserve.

NOTE: If you switch to the backup space, and the backup becomes the active space for this function, and has the Backup Required flag selected, then you cannot change the booking type of this space to Backup, because spaces that require backup cannot have a booking type of Backup.

Management of Room Blocks at the Quote Stage

A sales representative can create and reserve new property-specific room block line items for a quote record, and then drill down to the inventory display views to confirm reservation information as follows:

- If a generic sleeping room type has been specified for the opportunity, during quote creation, a check is performed to determine whether sleeping rooms are available and effective on the specified dates. Effectivity dates can be defined for a room to prevent it from being considered when booking before or after certain dates. If the room is ineffective, it cannot be booked.

- If sleeping rooms can be booked, the generic sleeping room type is converted to property-specific sleeping rooms. However, if not, the generic sleeping room type is copied to the quote.
- If, after attempting a room block reservation, the sales representative finds that a room type is not available, the sales representative can overbook the room.

If rooms have been overbooked, the sleeping room total group availability will appear as a negative value in the Total Availability view. For more information, see Checking Inventory Availability Using Property Screen Views on page 322.

This task is a step in Management of Room Blocks at the Quote Stage on page 306.

This topic includes the following related topics:

- Reserving and Overbooking Room Blocks on page 307
- Copying Room Blocks on page 309
- Parceling Room Block Inventory from One Room Block to Another on page 309
- Canceling Room Blocks on page 311
- Booking Suite Categories on page 311
- Booking Specific Suites on page 312
- Canceling a Suite Category on page 313
- Scheduling a Function in a Specific Suite on page 313

Reserving and Overbooking Room Blocks

Perform the steps in the following procedures to reserve and overbook room blocks.

This task is a step in Process of Working with Event Inventory on page 288.

To create and reserve a new room block

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Blocks list, select the room block, and then scroll down to the Room Block Line Items list.
6. In the Room Block Line Items list, add a record and complete the fields.

   NOTE: When a user selects a value for the Room Type field, only those sleeping rooms that are effective up to one day before the specified date are shown in the Pick Room Type dialog box. Users should also note that room block line items can only have one record with the same Day # and Room Type.

7 Click Reserve.

The Inventory Status field is automatically updated to Reserved, if the room block is available.

8 In the Room Block Line Item record, click the link in the Date field.

The Total Availability view appears.

9 Navigate back to the Quote Room Blocks list.

NOTE: In the Room Block Line Items list, select a record and click the link in the Room Type field to navigate to the SR Type Availability view.

To overbook a room block

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, query for the quote record.

3 In the Quote record, click the link in the Quote # field.

4 Click the Room Blocks view tab.

5 Scroll down to the Room Block Line Items list, and select the room block record for which the room type is not available.

The Inventory Status field shows a value of Unreserved.

6 Click Overbook.

The Inventory Status field is updated to Reserved.

Sleeping Room Availability Logic

A room block line item for a particular sleeping room type on a particular day is reserved or unreserved using the following logic:

- If the requested room block line item is less than or equal to the total available group rooms, then the Function Space Inventory engine reserves the room block.
- If the requested room block is greater than the total available group rooms, the Function Space engine returns a status of Unreserved.

These availability checks are performed for each room type.

The Total Group Availability for a sleeping room type on a particular date is determined using the following formula:

Total Authorized - [Max (Transient Optimal, Transient Sold) + Max (Group Room Blocked, Group Room Picked Up)]

where

Transient Optimal = Capacity-Group Optimal

Total Authorized = Group Authorized + Transient Optimal

Capacity, Group Optimal and Group Authorized numbers are set up in the Property Pricing Admin Inventory Control view.

Transient Sold and Group Rooms picked up values are derived from the Central Reservation System (CRS). Integration with CRS is the responsibility of the system integrators.

Copying Room Blocks

If necessary, you may copy room blocks. This may help when entering numerous room blocks for a quote. When you copy a room block, the room block details and existing line items are copied to the new room block.

This task is a step in Process of Working with Event Inventory on page 288.

To copy a room block

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required record.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. In the Room Blocks list, select the required room block, and then click Copy.

   The new room block appears in the list.

Parceling Room Block Inventory from One Room Block to Another

Parceling inventory is the transfer of reserved sleeping rooms from one room block to another room block. For example, if there are 100 sleeping rooms reserved as part of a room block, and only eighty of these rooms have been picked up by customers, then the other twenty may be transferred to another room block. As these sleeping rooms have already been reserved, they will not need to be reserved after the transfer. This functionality may often be used when reserving rooms for different types of people attending a function. For example, if the customer reserves 100 rooms, it may be necessary to create a separate room block for VIPs after the initial room block has been created.

This task is a step in Management of Room Blocks at the Quote Stage on page 306.

To parcel room block inventory from one room block to another

1. Navigate to the Quotes screen > Quotes list view.
2. In the quotes list, query for and select the required quote.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. In the Room Block list, select the room block from which you wish to transfer sleeping rooms.

5 Scroll down to the Room Block Line Items tab, select the type of sleeping rooms that you would like to transfer, and click Parceling.

The Reservation Transfer selection dialog box is displayed.

6 Complete the fields, and click OK.

The following table describes some of the fields.

Field	Comments
Existing Reserved Rooms	Shows the amount of rooms of this type that have already been reserved for the selected room block. This field is read-only.
Room Type	The type of room to be transferred between the room blocks. This field is read-only.
From Room Block	The name of the room block from which the rooms are to be transferred. This field is read-only.
To Room Block	The name of the room block to which the rooms are to be transferred. Click the select button, select the room block to which you want to transfer rooms, and click OK in the To Room Block selection dialog box.
# Transferred	The number of rooms to be transferred between the room blocks. This value is calculated as the Blocked value minus the Picked up value.

The required number of rooms are transferred between the room blocks, and this is reflected in the Contracted field for the room block line items.

NOTE: Parceling works primarily on the blocked numbers and it is this number that is transferred between room blocks. However, for ease of use the contracted and projected numbers are also decreased by the same amount as the blocked numbers. If the contracted number becomes negative in the process, an error message is displayed.

Using the Room Block Inventory Buttons

The following inventory buttons can be used in the Room Blocks view tab:

- **Release.** Click this button to release the inventory associated with the whole room block.
- **Reprice.** Click this button to recalculate the price of the room block.
- **Reprice All.** Click this button to recalculate the price of all room blocks.
- **Reserve.** Click this button to reserve the selected room block.
- **Calculate Rates.** Click this button to calculate the rates for all room blocks.
- **Equalize.** Click this button to convert all blocked values to picked up values. A user clicks this button after a cutoff date has passed, when all blocked numbers for all line items should become equal to the picked up numbers.

Canceling Room Blocks

The event manager uses the Room Blocks view to confirm and update occupancy information and reservation details. If the particular room block is no longer needed, the event manager can cancel the room block.

This task is a step in Process of Working with Event Inventory on page 288.

To cancel a room block

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Blocks list, select the room block record, and then scroll down to the Room Block Line Items list.
6. In the Room Block Line Items list, select one or more room block line items.
7. Click Cancel Room Block.

   The Inventory Status field is updated to Unreserved, and the Status field is updated to Cancel.

Booking Suite Categories

A sales representative can book a suite (category) for use as a sleeping room. After the booking process is complete, the sales representative can navigate to the Function Space Diary view and confirm the reservation information.

The Function Space Diary shows the availability and event function schedule information in a Gantt chart format, and users can view the schedule of bookings against a function space category or specific space. In the diary views, the user can specify a start date or time scale to view booking information, and change bookings using drag and drop.

When booking a suite category, the sales representative should see the suite category displayed in the Function Space Diary with bars extending across the Gantt chart for the entire length of time between check-in and check-out times for the suite sleeping room.

This task is a step in Process of Working with Event Inventory on page 288.

To reserve a suite category

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.

5 In the Room Block Line Items list, create a new record, select a room type of Suite Category, and complete the remaining fields.

NOTE: When selecting a value for the Room Type field, note that only those sleeping rooms that are effective up to one day before the specified date are shown in the Pick Room Type dialog box.

6 Click Reserve.

The Inventory Status field is updated to Reserved if the room block is available.

7 Navigate to the Function Space Diary screen, and query for the property.

8 From the Property form, scroll down to the Function Space Diary Gantt chart.

9 If necessary, update the Start Date and Time Scale fields, and then click Go.

Booking Specific Suites

The sales representative can reserve a specific suite within a suite category reservation. In this instance, the user first selects the suite category as a room block line item, and then in the specific suites list, selects a specific suite related to the suite category. After the specific suite record is saved, the reservation process automatically launches.

This task is a step in Process of Working with Event Inventory on page 288.

To reserve a specific suite

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, query for the quote record.

3 In the Quote record, click the link in the Quote # field.

4 Click the Room Blocks view tab.

5 In the Room Block Line Items list, add a record.

6 In the record, select Suite Category in the Room Type field, and then complete the remaining fields.

7 Click Reserve.

The Inventory Status field is updated to Reserved if the room block is available.

8 Drill down on the Room Block Name value.

The Room Blocks screen's Line Items view appears.

9 Scroll down to the Specific Suites list.

10 In the Specific Suites list, create a new record, and select a room from the Room dialog box.

11 Save the record.

The reservation processes automatically.

Canceling a Suite Category

The event manager can confirm and update occupancy information and reservation details using the Room Blocks view. If the particular suite category is no longer needed, the event manager can cancel it.

This task is a step in Process of Working with Event Inventory on page 288.

To cancel a suite category

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Block Line Items list, select a room block line item of room type Suite Category.
6. Click Cancel.

   The Inventory Status field is updated to Unreserved and the Status field is updated to Cancel.

Scheduling a Function in a Specific Suite

The sales representative can schedule a function in a reserved specific suite used for sleeping. After entering function information for the specific suite, the sales representative clicks Reserve for the function.

NOTE: The sales representative should not attempt to schedule a function for an unreserved specific suite even though the Function Scheduling button is enabled.

This task is a step in Process of Working with Event Inventory on page 288.

To schedule a function for the booked specific suite

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Block Line Items list, select a room block line item of room type Suite Category.
6. Drill down on the Room Block Name value.

   The Room Blocks screen's Line Items view appears.
7. Scroll down to the Specific Suites list.

8 In the Specific Suites list, select the reserved specific suite record, and then click Function Scheduling.

   Clicking this button creates a new function record and takes the user to the Functions screen's More Info view. Only the record the user creates should be displayed in the Functions list. The user must specify a start and end time for the function before reserving it. The user can change the function type.

9 In the function record, update the fields, and then click Reserve.

Background Processes at the Quote Level

Two background workflow processes are used to set the entire inventory of a quote to unreserved. The administrator must verify that these workflows are activated. For more information on activating workflows, see Hospitality Workflow Processes on page 29.

The two background processes that run against the quote include:

1 **Process 1.** After the procedures in Management of Functions at the Quote Stage are completed, a background process is activated that monitors the quote. This process should always be available. At this point, the Inventory Status field is set to Reserved for both Function and Sleeping Room records associated with the quote. After a predefined amount of time passes, the system checks the Status field on the quote record. If the Status field is still set to Prospect, the workflow process automatically updates the Inventory Status to Unreserved for both Functions and Sleeping Rooms associated with the quote, and the inventory is released. However, the status for each function and sleeping room status remains as Prospect.

2 **Process 2.** When the quote's Decision Date field is completed, the second background process begins. This process should always be available also. When the Decision Date passes, the system automatically releases all inventory, which includes Function Space Inventory and Room Block Inventory.

NOTE: Sample workflows are available but each customer can change them based on their own needs.

Changing Attributes Critical to Inventory Reservation

The sales representative can continue to update the function, room block, and quote records throughout the sales process. If inventory is not reserved, the updates do not affect the status of the records. However, if inventory is being held, updates may affect the status of the inventory.

For example, if an existing function that has an arrival date of March 14 must be postponed until April 23, the date change on the function record may affect the Reserved status for the identified function space. If the inventory is not available on the new date, users can undo their changes before losing the inventory on the original date.

This task is a step in Process of Working with Event Inventory on page 288 and includes the following related topics:

- Inventory Critical Fields at the Function Level on page 315
- Inventory Critical Fields at the Room Block Level on page 316
- Inventory Critical Fields at the Quote Level on page 317

Inventory Critical Fields at the Function Level

Modifications to several fields in the function record can affect inventory. If multiple updates are made to a reserved function, the system alerts the user that additional actions must be performed.

Date and Time Changes

Whenever the user changes the values for Start Time, Duration, Date, and Day #, and attempts to save the function record, a message provides a suggested course of action.

Users can configure the application to eliminate the reminder dialog box, or they can set up a process that automatically checks availability. See To configure availability status checking on page 315 for more information.

When the user sees the following message, the user can proceed with the reservation by clicking OK.

> Function parameters have changed. Would you like to check availability with new parameters?

Two results are possible after the availability check:

- The function space is still available with the updated parameters (Date, Start Time, or Duration) and the function space is automatically reserved with the new value. The Inventory Status is set to Reserved, and the updated parameters are saved.
- The reservation is not possible, and the user sees the following message:

  > The availability check has failed. Click OK to save, or Cancel to undo.

If the user clicks OK, the updated parameter remains, and the Inventory Status becomes Unreserved. If the user selects Cancel, the system restores the original parameters, and the Inventory Status remains as Reserved.

To configure availability status checking

1. Log into Siebel Tools as an administrator.
2. In the Object Explorer, navigate to Applet.
3. Query for the appropriate function or room block applet (for example TNT SHM Functions List Applet or TNT SHM Room Blocks List Applet).
4. Navigate to Applet > Applet User Prop.
5. Query for the Check Availability Status User.
6. In the Value field, enter the appropriate information.

- If you do not enter any value for this field, the reminder dialog box is displayed to the user.
- If you enter Yes as the value, the automatic availability check is performed and no reminder dialog box is displayed.
- If you enter No as the value, no reminder dialog box is displayed and no automatic availability check is performed.

7 Recompile and replace the SRF.

Function Space and Setup Style Combination

The user can see the setup styles associated with the specific space on a particular property from the Property Administration screen's Specific Space view, which includes a Setup Style list. Setup Styles are created by the administrator during property administration. For more information, see Creating Property-Specific Setup Styles and Associating Packages on page 63.

The user can update either the function space or setup style fields using the Quote Function view. When the user updates either of these fields, the system attempts to validate the Setup Style-Function Space combination. If the combination is invalid, the following message appears:

Invalid combination of function space and setup style.

If the Setup Style is changed and the Setup Style-Function Space combination is valid, the system saves the value selected in the Setup Style field.

If the function space is changed for a reserved function and the Setup Style-Function Space combination is valid, the system saves the selected values.

Function Status and Released Inventory

When the user changes the Function Status field value to a value that releases inventory, the Inventory Status field is updated to Unreserved. The function status values that result in released inventory are:

- Cancel
- Lost/Turndown

NOTE: If the user changes the Function Status value to Lost/Turndown, inventory is released for all function spaces.

Inventory Critical Fields at the Room Block Level

Inventory critical fields also exist at the room block level. In a process similar to that which occurs at the function level, the system monitors for changes and verifies that the records are valid after each update. If multiple updates occur for a reserved room block record, a message appears that provides a suggested course of action.

Date and Time Changes

When the user updates either the Date or the Day # field for a reserved room block, the same process occurs as when changes are made at the function level. For more information, see Inventory Critical Fields at the Function Level on page 315.

Room Block Changes and Availability Checks

When the user increases the room block for a reserved room block record, a message alerts the user that an availability check must be performed. The standard reservation process is followed, and the user can either save the changes with a Reserved or Unreserved Inventory Status, or click Cancel to restore the original Blocked values.

Inventory Critical Fields at the Quote Level

Changing the values in certain fields in the quote record can also impact the status of inventory.

Arrival Date Updates

If the user updates the Arrival Date in the quote record, a message alerts the user that the new date may result in the loss of reserved inventory. The system attempts to perform a reservation for the new date and automatically updates the Date field for the Room Block Line Item and Function records. If the inventory is available, the system rebooks the inventory against the new arrival date. If the availability check fails, the Inventory Status field is set to Unreserved for the Room Block Line Item and Function records and Not Booked for the Function Line Item records.

NOTE: If the user updates the arrival date and nothing changes for the selected sleeping rooms, check that the sleeping room is effective on the new date. If the sleeping room is not effective, the change will not be taken into account.

Actualizing a Function

The Actualization process is performed on Function and Room Block records. The process of setting a sales status to Actual occurs after the function is completed or the room block has been used. At that point, the revenue becomes actualized. See Table 31 for a description of the Actual status.

Actualized revenue is the total revenue generated from all sales (transient room, group room, catering, and so on). When the term is applied to sleeping rooms, it refers to the number of sleeping rooms on the property that were actually used. Actual status can also be applied to food and beverage covers and event attendees.

When the function and room block records are actualized, the following actions occur:

- The function or room block record becomes read-only.
- The Inventory Status field is automatically updated to Actual.
- The Function is displayed as Actual in the Function Space Diary.

This task is a step in Process of Working with Event Inventory on page 288.

To actualize a function

1. Navigate to the Quote screen > List view.
2. In the Quotes list, query for the quote associated with the function that is to be actualized.
3. In the Quote record, click the link in the Name field.
4. In the Quote Functions list, select the completed function record, and update the Function Status field to Actual.
5. Save the record.

To actualize a room block

1. Navigate to the Quote screen > List view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Quote # field.
4. In the Room Blocks Line Items list, select the Room Block Line Item record, and update the Status field to Actual.
5. Save the record.

Out of Order and Unavailable

Out of Order and Unavailable records are defined at the property level. Both record types prevent any bookings against the specific space. For more information about creating Out of Order and Unavailable records, see Marking Function Spaces as Unavailable or Out Of Order on page 157.

The Out of Order and Unavailable records are referenced when the user creates bookings against a specific space. If the user tries to book a function against a specific space at the date or time the specific space has an Out of Order or Unavailable record associated with it, the Inventory Status is set to Unreserved.

NOTE: Out of Order and Unavailable bookings cannot be changed using drag and drop in the Function Space Diary.

Time Shifting Event Functions and Room Blocks

As part of setting up function spaces and sleeping rooms with relevant attributes, users can shift booking times for functions and sleeping rooms. They can perform time shifts as well as review details and summaries using the following views, which are available from the Quotes screen's Time Shift view:

- Function Shift view
- Room Block Shift view
- Summary view

- Function Shift (Revenue) view

This task is a step in Process of Working with Event Inventory on page 288.

NOTE: The property associated with the functions or room blocks that a user wants to time-shift must have both profit series and day parts defined. If no profit series or day parts are defined, an error message appears when the user attempts to perform a time shift.

Time Shifting Event Functions and Room Blocks

When a user attempts to time shift a function or room block, the system verifies whether the function space, category, or sleeping room is still effective for the date to which the booking is being shifted. For example, the effective end date for Salon A is January 15, 2005. A function is reserved for January 14, 2005 in Salon A. If the user time-shifts the function to a date on which the function space is no longer effective (for example, January 16), the function space is not copied to the revised quote and the inventory status for the booking changes to Unreserved.

To perform a time shift of event functions

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Time Shift view tab, and then click the Function Shift view link.
5. In the Original Quote Functions list, select one or more functions, and then click Time Shift.

   In the Time Shift Functions dialog box, perform one of the following steps:

   - Select the Shift by Time check box, and then enter the hours and minutes.
   - Select the Shift by Day check box and enter the number of days. A negative day value shifts the function back, and a positive day value shifts the function forward in time.
   - Select the Shift by Date check box, and select a date.
6. Click Shift Functions.
7. In the Revised Quote Functions list, click Accept to accept the revised function or Reject to reject the revised function.
8. Click on the Date field in either of the Function lists to navigate directly to the Function Space Diary and review the original or revised function in the context of other bookings. Users can also click on the Start Time value to navigate directly to the Functions screen's Line Items view.

NOTE: When a user time shifts a function, an attempt is made to reserve both the active and backup spaces for the function. If it is not possible to reserve the active space, then the backup space is not reserved. However, if the active space is reserved, it is not necessary for the backup spaces to be reserved in order to time shift the function.

To perform a time shift for room blocks

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Time Shift view tab.
5. In the Time Shift view, click the Room Block Shift link.
6. In the Original Room Blocks list, select one or more room block records.
7. Click Time Shift.
8. In the Time Shift Room Blocks dialog box, select the option appropriate for your needs:
   - Select the Shift by Day check box, and then enter the number of days.

     A negative day value shifts the room block back, and a positive day value shifts the room block forward.
   - Select the Shift by Date check box, and then choose a date.
9. Click Shift Room Blocks.
10. If necessary, click the select button in the Room Type field, and choose a different room type for any of the records.
11. In the Revised Room Blocks list, click Accept to accept the revised room block or Reject to reject the revised room block.

    NOTE: If the sleeping room is not effective during the new dates, the change will not be taken into account.

Reviewing Time Shift Information at the Quote Level

Use the Quotes screen's Time Shift > Summary view to review details of both functions and room blocks that have been time shifted. This summary information is only based upon the active function spaces for a function, and does not take backup spaces into account.

After time shifting functions it may also be useful to compare the revenue estimates for both the original and revised functions. This comparison can be made using the Quotes screen's Time Shift > Function Shift (Revenue) view.

NOTE: Revenue is calculated at the time of the quote, based on the defined average value (see Setting Up Average Values and Function Types on page 155). However, if the revenue is to be calculated on the basis of the line items, then the user would select the Line Item Sum check box on the Quotes screen's Functions > Functions list.

To review the time shift summary

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.

3 In the Quote record, click the link in the Quote # field.

4 Click the Time Shift view tab, and then click the Summary link.

5 Use the Original Quote Summary and the Revised Quote Summary forms to compare the details.

To compare time shift revenue estimates

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, query for the quote record.

3 In the Quote record, click the link in the Quote # field.

4 Click the Time Shift view tab, and then click the Function Shift (Revenue) link.

5 Use the Original Revenue Estimates and the Revised Revenue Estimates lists to compare the estimated revenue.

Event Shifting at the Quote Level

During the event planning process, customers often change the start and end time of an event that affects a series of function space bookings. For example, a customer may schedule an event that spans three days, Monday through Wednesday, and each day has an agenda that corresponds to function space bookings. The customer decides to start the event on Tuesday instead of Monday, keeping the same three-day agenda.

When shifting the time of a series of bookings, the Function Space Inventory engine can reschedule bookings into time slots that are occupied by other bookings in the same series. For example, Monday bookings are moved to Tuesday time periods that were occupied by Tuesday bookings; Tuesday bookings are moved to Wednesday time periods that were occupied by Wednesday bookings, and so on.

When bookings are shifted to different dates, inventory may be lost or not secured for the desired dates. Inventory may be available but is priced too high for the customer. In these situations, the event and day shifting process helps the sales user evaluate a change to the quote by viewing the room block pricing on the new date without losing the previous inventory.

This task is a step in Process of Working with Event Inventory on page 288.

To perform an event shift at the Quote level

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, query for the quote record.

3 Click Time Shift.

4 In the Time Shift Event dialog box, perform one of the following steps:

- Select the Shift by Day check box, and enter the number of days.

  A negative day value shifts the event back, and a positive day value shifts the event forward.

- Select the Shift by Date check box, and choose the new date.

5 Click Event Shift.

Checking Inventory Availability Using Property Screen Views

There are three inventory display views that can be accessed using the Property Screen. These views are used to display available inventory for sleeping rooms, allowing the user to assess the availability of different sleeping room types on a daily basis for a seven-day period. The views and related topics are:

- **Total Group Availability.** For more information, see Reviewing Total Group Availability on page 322.
- **SR Type Availability.** For more information on sleeping room type availability, see Reviewing Sleeping Room Type Availability on page 323.
- **Total Availability.** For more information, see Reviewing Total, Group, and Transient Availability on page 324.
- **Group Projected/Blocked.** For more information, see Reviewing Group Projected and Blocked Availability on page 326.

Two additional views help the user locate quotes and opportunities associated with the property. The two views include:

- Property screen's Quotes view
- Property screen's Opportunities view

Reviewing Total Group Availability

The Total Group Availability view shows the group sleeping room availability information for a particular property. The availability numbers are displayed by type and date, with the default date equal to the current date spanning across an eight-day period.

The information displayed on the view includes:

- **Group Authorized.** Displays values for each room type (Deluxe, Standard, and Upgrade).
- **Group Optimal.** Displays values for each room type.
- **Group Blocked.** Displays total values for the function statuses Prospect, Hold, T1, T2, and Definite. A separate total value is also shown for function statuses Definite and Hold.
- **Group Projected.** Displays total values for the function statuses Prospect, Hold, T1, T2, and Definite. A separate total value is also shown for function statuses Definite and Hold.
- **Total Group Availability.** Displays values for each room type.

Use the Date form to query for a different start date and view the group availability numbers for an eight-day range, starting with the specified date.

This task is a step in Process of Working with Event Inventory on page 288.

Dates/Notes Button

The Dates/Notes button displays information about any special dates or sell notes for a particular property. When the user clicks the Dates/Notes button, a list of Sell Notes/Special Dates corresponding to the date range shown for inventory appears.

Go to Diary Button

The Go to Diary button allows the user to navigate directly to the Function Space Diary. The date shown in the diary is the first date in the Total Group Availability view's date range.

Tentative/Not Tentative Button

The Tentative/Not Tentative button toggles the display to show or exclude records with a tentative status (T1, T2).

To review Total Group Availability

1. Navigate to the Property screen.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Click the Total Group Availability view tab.
5. (Optional) Enter a date, and click Search.

   NOTE: Users can also use the paging buttons to move forward and backward one week or one day at a time.

Reviewing Sleeping Room Type Availability

The SR Type Availability view shows the availability information for a specified sleeping room type at a particular property. The availability numbers are broken down by room type and date. When users navigate to this view, they can see the sleeping room availability for the current date as well as for the next eight days.

Using the Date form, users can query for different sleeping room types and date combinations to display the appropriate availability numbers.

A Dates/Notes and a Go to Diary button are available in this view. See "Reviewing Total Group Availability" on page 322 for more information on these buttons.

This task is a step in Process of Working with Event Inventory on page 288.

To review SR Type Availability

1. Navigate to the Property screen.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Click the SR Type Availability view tab.
5. (Optional) Enter a date and sleeping room type in the fields, and click Search.

Navigating to the SR Type Availability View

Users can navigate to the Property SR Type Availability view by clicking the Room Type field in any Room Block Line item record in the Quotes Room Blocks view. Using this method, they navigate to the SR Type Availability view and see availability information beginning with the date assigned to the Room Block Line Item record.

Reviewing Total, Group, and Transient Availability

The sales representative, event execution user, and the revenue manager can use the Property screen's Total Availability view to gain a better understanding of the total sleeping room availability information for a property. The Total Availability view contains a Property form, a Date query form, and three read-only lists.

A Dates/Notes and a Go to Diary button are available for the Total Transient Availability and Total Group Availability lists. See Reviewing Total Group Availability on page 322 for more information on these buttons.

The Property form provides high-level information about the property in the Key Property Information, Property Classification, Capacity Information, Systems Information, Units Information, and Rating Information sections.

Use the Date form to query for a different start date and view the availability numbers for an eight-day range, starting with the specified date. The start date specified in the query is displayed synchronously across the three lists.

Under the Date form, three lists show availability figures by total, group, and transient availability. By default, all three lists show availability counts, by type, starting with the current date.

The Total Availability list shows the total for the transient and group information. It provides a snapshot view of the total number of available sleeping rooms.

Table 33 describes the information that appears in the rows in the Total Availability list.

Table 33. Total Availability Row Description

Field	Comments
Capacity	A calculated field that displays a sum of the all the sleeping rooms for the property.
Group Picked Up	Total number of sleeping rooms that were actually picked up from blocked group rooms.
Total Authorized	Calculated value. The total number of sleeping rooms available for the property.
Total Booked	Calculated value. The sum of blocked group and transient rooms.
Total Available	Calculated value. The number of rooms available for booking.
Occupied%	The ratio of the total booked to capacity.
Actual Available	The difference between capacity and total booked.
Sell Notes	Revenue managers can flag days as high priority for event sales and add sell notes to describe the sales strategy the property is implementing. This row shows the number of sell notes that are applicable on that given date.

The Total Group Availability list available from these screens is identical to the list that appears in the Property screen's Total Group Availability view.

The Total Transient Availability list shows the number of transient sleeping rooms available for a particular property. The numbers are broken down further into types that include:

- Transient Booked
- Transient Available
- Transient Optimal
- Sell Notes

Transient availability information is typically populated by system integrators.

This task is a step in Process of Working with Event Inventory on page 288.

To review Total Availability

1. Navigate to the Property screen.
2. From the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Click the Total Availability view tab.

5 (Optional) Enter a date and click Search.

Navigating to the Total Availability View

Users can navigate to the Property screen's Total Availability view by clicking the Date field in any Room Block Line item record. For example, a user can click the Date field in the Quotes screen's Room Blocks view. Using this method, the user can navigate to the Total Availability view and see availability information beginning with the date assigned to the Room Block Line Item record.

Users can also navigate to the Total Availability view from the Function Space Diary screen. The following procedure describes this method.

To navigate to the Total Availability view from the Function Space Diary screen

1. Navigate to the Function Space Diary screen.
2. Query for a property record.
3. Click the appropriate diary view tab.
4. In the selected view, enter the required start date and time scale, and click Go.
5. Click the date shown on the major time axis in the Function Space Diary.

   The Total Availability view appears showing a start date that corresponds to the date entered in the Start Date field in the diary.

Reviewing Group Projected and Blocked Availability

The sales representative and the revenue manager can use the Property screen's Group Projected/ Blocked view to gain a better understanding of what is projected or blocked for each quote for the property across the time period.

The Group Projected/Blocked view contains a Property form, a Date form, and two read-only lists. A Dates/Notes and a Go to Diary button are available for the Total Group Availability list. See "Reviewing Total Group Availability" on page 322 for more information on these buttons.

This task is a step in Process of Working with Event Inventory on page 288.

The information displayed on the view includes:

- Quote Name
- Quote Status
- Sales Manager
- Event Manager
- Blocked and projected values for each day in the date range
- Total blocked and projected values for the date range

The Total Group Availability list available from these screens is identical to the list that appears in the Property screen's Total Group Availability view.

To review Group Projected and Blocked Availability

1. Navigate to the Property screen.
2. From the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Click the Group Projected / Blocked view tab.
5. (Optional) Enter a date, and click Search.
6. Scroll to the bottom to view the total values for each day.
7. Scroll to the right to view the total values for the date range.

19 Booking Hospitality Assets

This chapter describes the end-user process of booking Hospitality assets. It includes the following topics:

- About Hospitality Assets on page 330
- Scenario for Booking Hospitality Assets on page 333
- Process of Booking Hospitality Assets on page 333
- Defining the Asset Inventory Status Display Color Scheme on page 333
- Booking Critical and Noncritical Assets on page 334
- Launching Cluster Booking of Assets on page 335
- Viewing Assets Associated with a Product on page 336
- Viewing Asset Availability and Booking Information on page 336

About Hospitality Assets

An *asset* is a physical instance of a product that is tracked in a centralized database and associated with an individual property. End users reserve required items for an event using automated booking for critical resources and one-click booking for noncritical resources.

Unlike function space products and room block products, catering products are booked as assets. When an end user tries to reserve a product, the user is actually reserving assets, not catering products.

Multiple assets can be associated with a single product. For example, the user might create a product record called Piano with the following assets:

- Yamaha Piano at New York property, Serial # 7896-0987
- Wurlitzer Piano at London property, Serial # Z765-9876

NOTE: An asset cannot be created unless a product for that asset has already been defined.

Each catering product is classified by resource type. The three types of resource types are:

- **Critical.** A *critical product* is any resource that is critical to the event; very few products are defined as critical. If, for example, there is only one grand piano for the entire property, the piano might be designated as a critical product. A critical product must be booked in order that an event can be carried out successfully at a property. When a quote is generated for an NPP, the availability check for critical asset inventory is not launched.
- **Non Critical.** A *noncritical product* is defined as any resource that is generally available in sufficient quantities at the property, but must be reserved. An example is a projector.
- **General.** General products are common resources that are not difficult to replenish and do not require booking. Examples include tables and chairs, which are available in sufficient quantities at the property and do not need to be booked.

In a typical asset record, the Product field shows the centralized product definition. The Property field shows the property with which the asset is associated. The asset Description field allows the asset description to be customized by property. The Ownership field shows rental and leased assets tracked by owner.

Automatic Reservation of Critical Assets

Critical resources are automatically reserved after the user creates a new Function line item or changes the line item quantity and saves the record. Critical resources also are reserved when a Function line item for a critical asset is copied or when the service start time is changed. If booking is unsuccessful for a critical resource, the status is changed to Not Available or Not Enough Assets.

If changes are made to the function, such as a status change or a time change, then the asset inventory booking process is automatically launched.

AutoBook and Noncritical Assets

Noncritical assets are reserved using the AutoBook functionality. When launched, the AutoBook process attempts to book all line items listed for the function at the property where the event is being held for the specified function time. The AutoBook process reserves the first available listed assets that meet the line item's quantity and time period specifications.

Using AutoBook, event and operations managers can first enter all the applicable noncritical Function line items and then click AutoBook to reserve all of the line items at one time.

After the initial entry, if line items are added or quantities changed, then the Inventory Status of the asset is changed to Not Booked. The sales representative must then re-launch the availability check using the AutoBook function. If the user deletes line items, then the item is automatically unbooked.

AutoBook can also be used in some instances to reserve critical resources. For example, the user might change the function time or service time and, as a result, the critical asset that is booked becomes unbooked. In this case the user can then rebook the critical asset by clicking AutoBook.

Double-Booking and Rerenting Using the Availability Gantt Chart View

In some cases, a particular asset at a property is requested for more than one function scheduled for the same time. The first booking request successfully reserves the asset. An additional booking request fails to reserve the asset. If the inventory status for the desired item is Not Available, the user can choose to double-book the asset.

Alternatively, a product may have four assets at a property all of which are currently booked. However, the sales representative tries to book five assets but cannot because there are only four available at the property. In this case, the inventory status would be returned to the sales representative as Re-Rent, and in the Availability view, the sales representative can see that four of the assets are double booked, and that the fifth asset can be rerented.

When the Double Book/Re-rent button is clicked, a time-specific request (which means that the asset is booked at a specific time) is created for the asset. A double-book/rerent request does not, however, automatically result in an asset reservation for the second requestor if the first request is canceled. The user still has to select the Auto Book button for the change to be reflected at the line item level. In addition, there is no limit on the number of times an asset may be double-booked.

NOTE: Only critical and noncritical products may be double-booked. All types of products may be rerented.

When an asset is double-booked, the Inventory Status for the line item changes to Double Booked. When an asset is rerented, the status is changed to Re-rent. In the Function Line Item Availability view, the Gantt chart shows two bars that represents the bookings, with the double-booked/rerented asset displayed in a different color. The Gantt chart shows the times for which individual assets are reserved or double-booked/rerented and the identities of the users who have booked or double-booked/rerented those assets. This information can be useful if the second requestor wants to negotiate with the first requestor to determine whether or not the double-booked asset can be shared between the conflicting functions.

Table 34 describes the status values that occur when booking assets.

Table 34. Booking Statuses

Status	Description
Booked	The asset is booked for the quote.
Not Available	The asset is booked for another quote and is not available.
Double Booked	At least one additional booking request exists for a booked asset. A status of double-booked can also signify a partial double booking. This status occurs when a line item with a multiple quantity is double-booked. For example, if an item with a quantity of 3 is requested and only two of the three assets are available, then the first two assets are booked and the third asset is double-booked. The status for the line item becomes Double Booked.
Re-Rent	All available assets have been double booked, so this asset must be re-rented from another property. There is a limit on the rerent of assets, in that a particular asset can only be flagged to be re-rented a maximum of 10 times. If this number of re-rents is exceeded for any asset, then the Inventory Status for the asset is changed to Not Enough Assets. **NOTE:** The limit of 10 can be changed through configuration in Tools.
Not Enough Assets	The maximum number of rerentable assets has been exceeded, and as a result, there are not enough assets available.

Cluster Booking of Assets

In most cases, an event uses only assets that are located at the property where the event is to occur. However, if the property does not have enough assets to meet its needs, it may use the assets at another local property that is located in its property cluster. Siebel Hospitality allows the sales representative to add line items (or assets) that are located at other properties to the quote. This process is known as cluster booking.

When an asset has been added from a property in the cluster, this asset must can be AutoBooked, double-booked, or rerented in the same manner as assets that are located at the property. However, in this case, the assets are AutoBooked and double-booked using the Cluster AutoBook and Cluster Double Book options respectively, that are available from the Quote > Functions > Line Items menu. For more information about AutoBooking, double-booking, and rerenting, see AutoBook and Noncritical Assets on page 331 and Double-Booking and Rerenting Using the Availability Gantt Chart View on page 331.

Scenario for Booking Hospitality Assets

When booking a Hospitality asset, a sales representative can book both property-specific products, and can also book common products that have assets at various properties. For example, a particular property may have video conferencing capabilities that are specific to that property. On the other hand, many properties may have projectors for conferences that can be provided to other properties if requested. In this case, the sales representative would only be able to book the video conferencing facilities for the property at which it is available. However, it would be possible to book common product assets, like the projector, from another property.

Siebel Hospitality allows the user to book property-specific assets using the AutoBook and Double Book functionality. In order to book assets from other properties, the sales representative must launch cluster booking to add cluster products, and then must book these products using Cluster AutoBook and Cluster Double Book.

After assets have been booked, you can view all assets associated with a product, and also view the availability and booking information for these assets, and if necessary locate an appropriate substitute for the asset if it cannot be booked.

Process of Booking Hospitality Assets

This topic lists the tasks typically performed by event managers and operations managers when booking assets for an event. Your company may follow a different process according to its business requirements.

To book assets for an event, perform the following procedures:

1. Defining the Asset Inventory Status Display Color Scheme on page 333
2. Booking Critical and Noncritical Assets on page 334
3. Launching Cluster Booking of Assets on page 335
4. Viewing Assets Associated with a Product on page 336
5. Viewing Asset Availability and Booking Information on page 336

Defining the Asset Inventory Status Display Color Scheme

After creating assets for products, the user can specify a color scheme to define inventory status. Siebel Hospitality provides a predefined list of values (LOV) with default colors; a different color can be assigned to each asset status value such as Double Booked and Booked.

This task is a step in Process of Booking Hospitality Assets on page 333.

To assign status colors to assets

1. Navigate to the Function Space Administration screen > Function Space Diary Administration view.

2 In the Inventory Color Schema list, click create a new record.

3 In the new record, select an inventory status, and assign a color to the status.

Repeat this step to assign a color to each inventory status.

Booking Critical and Noncritical Assets

Assets may be booked from within the Function Line Items view for the function. However, sometimes the asset may already be booked for another function at the same time. In this case, the user can double-book or rerent the asset. For more information on double-booking and rerenting, see "About Hospitality Assets" on page 330. This procedure details how to book assets that are located at the property where the function is to take place.

NOTE: This procedure should only be performed after function line items are defined.

This task is a step in Process of Booking Hospitality Assets on page 333.

To reserve assets for function line items

1 Navigate to the Functions screen and query for the function.

2 In the Functions list, query for and select the required function, and click the link in the Function Name field.

3 In the Line Items list, click AutoBook to automatically assign available assets to the line items of the function.

If the booking is successful, the Inventory Status field shows a status of Booked. For nonparticipating properties, Autobook can be used to toggle between a status of Booked or Not Booked.

4 Review the Inventory Status field for each function line item to determine whether or not the line items were successfully booked and which line items need additional action such as overbooking.

5 Scroll down to the Assets list.

This list displays the assets for the selected function line item, along with some information about the asset, including its status.

To double-book or rerent assets for a function line item

1 Navigate to the Functions screen > Functions List view.

2 In the Functions list, query for the required function record.

3 In the Function record, click the link in the Function Name field.

4 In the Line Items list, select a line item whose Inventory Status is one of the following:

- Not Available. This status indicates that the asset must be double-booked.
- Re-rent. This status indicates that the asset must be rerented.

5 Click Double Book/Re-rent.

NOTE: Users cannot double book or rerent assets for nonparticipating properties.

Launching Cluster Booking of Assets

Before a sales representative can add cluster line items, property clusters must be set up, and properties must be added to these clusters. For more information, see Setting Up Property Clusters on page 50.

Also, the cluster line item must be added to the quote function before it can be booked. For more information about adding a cluster line item, see Adding Resource Cluster Line Items on page 259.

The following procedures detail how to launch cluster booking for cluster line items assets.

This task is a step in Process of Booking Hospitality Assets on page 333.

To reserve cluster assets for function line items

1 Navigate to the Functions screen and query for the function.

2 In the Functions list, query for and select the required function, and click the link in the Function Name field.

3 In the Line Items list, select the required cluster line item.

4 In the Line Items menu, select Cluster AutoBook to automatically assign available assets to the line items of the function.

   If the booking is successful, the Inventory Status field shows a status of Booked. For nonparticipating properties, Autobook can be used to toggle between a status of Booked or Not Booked.

5 Review the Inventory Status field for the cluster line item to determine whether or not the line items were successfully booked, and which line items need additional action such as overbooking.

To double-book or rerent cluster assets for a function line item

1 Navigate to the Functions screen > Functions List view.

2 In the Functions list, query for the required function record.

3 In the Function record, click the link in the Function Name field.

4 In the Line Items list, select a line item whose Inventory Status is one of the following:

   - Not Available. This status indicates that the asset must be double-booked.
   - Re-rent. This status indicates that the asset must be rerented.

5 From the Line Items menu, select Cluster Double Book.

NOTE: Users cannot double book or rerent assets for nonparticipating properties.

Viewing Assets Associated with a Product

A user can view the assets associated with a specific hospitality product using the Function Line Items Assets view. You can view the assets for both property-specific products and products from other properties.

This task is a step in Process of Booking Hospitality Assets on page 333.

To view assets associated with a product

1. Navigate to the Functions screen > Functions list view.
2. In the functions list, query for and select the required function.
3. In the Functions list, select the function, and click the link in the Function Name field.
4. In the Line Items list, select the line item, and then click the Assets view tab to view the assets for a product at a particular property.

   The following table describes some of the fields in the asset record.

Field	Comments
Asset #	The asset identifier
Product	The product with which the asset is associated
Status	The asset inventory status
Installed	The date the asset was installed
Serial #	The asset serial number

Viewing Asset Availability and Booking Information

A user can view the availability of assets associated with a specific hospitality product and asset booking information using the Function Line Items Availability and Category Availability views. It is possible to view the availability and booking information for both assets available at your property and also assets that have been booked from properties in your cluster. Gantt charts in these views are read-only but users can change the time axis by selecting a different time scale and start date and then clicking Go.

In Figure 11, the highlighted red box represents an asset that is double-booked. By positioning the mouse pointer over the highlighted area, users can view information about the quote and function, and the asset availability start and end times.

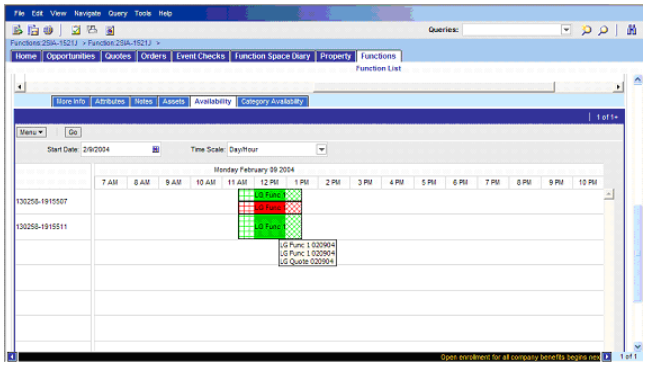


Figure 11. Asset Availability Gantt Chart

If the catering product that the user is trying to reserve is already booked, the user can attempt to negotiate with the user that is holding the asset booking or try to find an alternative asset that meets the criteria.

Locating the Owner of the Booked Asset

Use the Availability Gantt chart to determine who holds the booking for an asset.

This task is a step in Process of Booking Hospitality Assets on page 333.

To determine who has reserved an asset

1. Navigate to the Functions screen > Functions list view.
2. In the Functions list, query for and select the required function.
3. In the Function record, click the link in the function Name field.
4. In the Function Line Items list, select the required line item.
5. Scroll down and click the Assets view tab.
6. In the Assets list, select the asset, and note the asset number.
7. Click the Availability view tab to display a Gantt chart that shows the available assets for the selected inventory.
8. Locate the asset using the asset number that you noted in Step 6, and select the day and time period for the reservation.
9. Position the mouse cursor over the highlighted area in the asset record.

   The asset record shows the existing reservation's Quote Name, starting and ending date and times, and the setup and tear-down time.

10 Contact the owner of the booked asset, and determine if the asset can be shared.

Locating a Comparable Substitute for a Booked Asset

Using the Category Availability Gantt chart, users can locate an unreserved asset that can be substituted for an asset that is already booked.

The Category Availability chart shows the assets that are associated with a particular product and other products that belong to the same subcategory as the selected product. The chart also shows who has booked the assets. This form of display helps users to compare and contrast availability of products within the same category.

The user can position the mouse pointer over the assets on the y-axis and see the product details, description, subcategory, category, and product resource type.

This task is a step in Process of Booking Hospitality Assets on page 333.

To locate a substitute asset

1. Navigate to the Functions screen > Functions List view.
2. In the Functions list, query for and select the required function.
3. In the Function record, click the link in the function Name field.
4. In the Function > Line Items list, select the line item.
5. Scroll down and click the Assets view tab.
6. In the Assets list, select the asset, and note the asset identifier.
7. Click the Category Availability view tab to display a Gantt chart that shows similar products according to category and subcategory.
8. In the chart, position the mouse pointer over the asset that you noted in Step 6 to view details.

20 Managing Property-Specific Menus and Packages

This chapter describes how to manage property-specific menus and packages. It includes the following topics:

- "About Managing Menus and Packages" on page 339
- "Process of Managing Menus and Packages" on page 340
- "Revenue Estimate Examples for Menus and Packages" on page 352
- "Menu and Package Types Reference" on page 356

About Managing Menus and Packages

A *menu* is a grouping of Food and Beverage (F&B) items that may be sold together but will have an individual price attached to each item. A menu can include *only* F&B items. A menu can be a fixed-price menu that costs the same regardless of items selected, or a variable-price menu that depends on the items selected. A variable-price menu can include alternate choices with different prices; for example, a salmon entree for U.S. $24.95 or a prime rib entree for U.S. $29.95. In this case, the price for each person will vary depending on the individual selections.

A *package* is a grouping of items that may include menus, individual F&B items, individual non-F&B items, BEO (Banquet Event Order) items, and other packages. A package is sold as a unit for a set price; individual component items do not have individual prices. A package can have one overall price or a separate price for each person.

Several special types of menus and packages exist in Siebel Hospitality, as follows:

- **Menu Per Person.** This menu type provides for one menu for each person. This type can be a *set menu*, which is a menu with a fixed price for each person, or a *split menu*, which is a menu with a variable price for each person depending on the items selected.
- **Package Per Person.** This package type provides a fixed price for each person where individual item prices are not broken out.
- **Package Each.** This package type provides a fixed price for a quantity of 1 of the package, regardless of the number of people.
- **Package Item Price.** This package type provides a variable price for each person where individual item prices are broken out.

Menus and packages of these types are property-specific; that is, they are associated with a particular property, and are not generally available throughout the Siebel Hospitality system. If your access to Siebel Hospitality includes access to a property, you can see and work with the menus and packages associated with that property. Menus and packages may be associated with multiple properties through a *property cluster*, which is a group of properties that are linked to each other in the Siebel system. If your access to Siebel Hospitality includes access to a property cluster, you can see and work with menus and packages associated with all the properties in that cluster.

These types of menus and packages define how menus and packages are priced. Menu and package types also define the behaviors and calculations of multiple fields in parent menus, parent packages, and their child items. For more information about menus and packages pricing, see "Types of Menus and Packages" on page 96. For more information about menus and packages field behaviors and calculations, see "Menu and Package Types Reference" on page 356.

As a property manager or booking agent, you are responsible for managing property-specific menus and packages. You can add pre-structured menus and packages to functions that are associated with quotes and orders. You can modify menus, packages, menu and package product line items, and menu and package price line items. You can substitute products if the primary selected product runs out. You can create new menus and packages from component products. You can also track sales statistics for menus and packages.

Process of Managing Menus and Packages

This topic lists the tasks typically performed by property managers and booking agents when managing property-specific menus and packages for a function. Your company may follow a different process according to its business requirements.

To manage property-specific menus and packages for a function, perform the following procedures:

1. Associate menus and packages with specific functions by completing the following procedures:
   a. "Accessing Quote and Order Functions" on page 340
   b. "Adding Menu and Package Line Items to a Function" on page 341
   c. "Adding Menu and Package Line Items to Event Checks" on page 344
2. Manage function menus and packages by completing the following procedures, as needed:
   - "Editing Function Menus, Packages, and Line Items" on page 344
   - "Adding Products to a Menu or Package" on page 347
   - "Creating a Custom Menu or Package for a Function" on page 349
   - "Automatically Calculating System Allocations for Packages" on page 350
   - "Displaying Menu or Package Revenue Estimates" on page 350
   - "Substituting Products in a Menu or Package" on page 351
   - "Looking Up How Many Times a Menu Was Sold" on page 351

Accessing Quote and Order Functions

You add menus and packages to functions as function line items. A function may be associated with a quote or order. You can access functions associated with specific quotes from the Quotes screen. You can access functions associated with specific orders from the Orders screen.

For more information about functions associated with quotes, see "Managing Functions Associated with Quotes" on page 257. For more information about functions associated with orders, see "Creating Function Orders" on page 440.

NOTE: You can also add a menu, package, menu item, or event order item to an event check as a line item and associate it with a function. For more information, see "Adding Menu and Package Line Items to Event Checks" on page 344.

This task is a step in "Process of Managing Menus and Packages" on page 340.

To display quote functions

1. Navigate to the Quotes screen, then the List view.
2. Identify a quote that includes the function to which you want to add a menu or package.
3. Drill down on the quote's Name field.
4. Click the Functions view tab.

To display order functions

1. Navigate to the Orders screen, then the Event Order view.
2. Identify an order that includes the function to which you want to add a menu or package.
3. Drill down on the order's Name field.
4. Click the Functions view tab.

Adding Menu and Package Line Items to a Function

You add a menu, package, menu item, or event order item to a function by associating it with the function as a function line item. You can do this in several ways, as described in Table 35 and subsequent procedures in this topic.

Table 35. Adding Line Items to a Function

To add a line item by:	Follow this procedure:
Selecting a single product from a list of available products.	"To add line items to a function with the New button" on page 342
Selecting multiple products from a list of available products.	"To add line items to a function with the Add Items button" on page 342
Selecting one or more products from a list of products you create from filter criteria.	"To add line items to a function with the Search form" on page 343
Adding a single product by specifying its Product Code, Product Name, or Display Name.	"To add line items to a function with the Quick Add form" on page 343

This task is a step in "Process of Managing Menus and Packages" on page 340.

To add line items to a function with the New button

1. Display a list of functions associated with quotes or orders. For more information, see "Accessing Quote and Order Functions" on page 340.
2. In the Function list, select the function to which you want to add a menu or package.
3. Click the Line Items subview tab.
4. In the Line Items list, click New.
5. In the new record, click the Item field's selection button.
6. In the Pick Line Item dialog box, do the following:
   a. In the Type field, select one of the menu or package types listed in the table that follows and click Go.

Type	Comments
Menu Per Person	One menu for each person. The price can be a fixed price for each person, or a variable price for each person depending on the items selected.
Package Each	Fixed price for a quantity of 1 of the package, regardless of the number of people.
Package Item Price	Variable price for each person where individual item prices are broken out.
Package Per Person	Fixed price for each person where individual item prices are not broken out.

   b. In the resulting list, select the menu or package record you want to add to the function and click OK.

   The menu or package record appears in the Line Items list. If the menu or package has associated child products, it displays a folder icon.
7. To view the menu or package's component child items, expand the folder.

To add line items to a function with the Add Items button

1. Display a list of functions associated with quotes or orders. For more information, see "Accessing Quote and Order Functions" on page 340.
2. In the Function list, select the function to which you want to add line items.
3. Click the Line Items subview tab.
4. In the line items list, click Add Items.

   Siebel Hospitality displays the Pick Products dialog box.

5 In the Pick Products dialog box, do the following:

   a Identify each product to add as a line item and select it by entering a value in its Order Qty field.

   b Click Add.

   The products you selected appear in the list in the lower part of the dialog box.

   c Click OK.

   Siebel Hospitality displays the Function Line Items view with the products you selected added as line items.

To add line items to a function with the Search form

1 Display a list of functions associated with quotes or orders. For more information, see "Accessing Quote and Order Functions" on page 340.

2 In the Function list, select the function to which you want to add line items.

3 Click the Line Items subview tab.

4 Scroll down to the bottom of the screen.

5 In the Search form, enter criteria for the products you want to add to the current function as line items and click Search.

   The products that match your criteria appear in the Results list below the Search form.

6 In the Results list, select the products you want to add as line items and click Add Item.

   Siebel Hospitality displays the Line Items list with the products you selected added as line items.

To add line items to a function with the Quick Add form

1 Display a list of functions associated with quotes or orders. For more information, see "Accessing Quote and Order Functions" on page 340.

2 In the Function list, select the function to which you want to add line items.

3 Click the Line Items subview tab.

4 Scroll down to the bottom of the screen.

5 In the Quick Add form, enter the Product Code, Product Name, or Display Name for the product you want to add to the current function as a line item.

   The products that match your criteria appear in the Results list below the Search form.

6 Click Add Item.

   Siebel Hospitality displays the Line Items list with the product you specified added as a line item.

Adding Menu and Package Line Items to Event Checks

You can add menus and packages to an event check as line items and associate these line items with specific functions. For more information about event check line items, see "Adding Line Items to an Event Check" on page 453.

This task is a step in "Process of Managing Menus and Packages" on page 340.

To add a menu or package line item to an event check

1. Navigate to the Event Checks screen, Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check # field, and then click the Line Items view tab.
4. In the Line Items list, create a new record.
5. In the Function field, select the function with which you want to associate the menu or package.
6. In the Item field, select a menu or package.
7. Complete the other fields, as required.

After you have added a menu or package to as an event check line item, you can edit, add products to, or substitute products in the menu or package line item as described in the procedures that follow. You cannot, however, create custom menus or packages for event check functions.

Editing Function Menus, Packages, and Line Items

You can modify the details of menus, packages, and their child product items that are associated with functions.

This task is a step in "Process of Managing Menus and Packages" on page 340.

To edit a function menu or package

1. Display a list of functions associated with quotes or orders. For more information, see "Accessing Quote and Order Functions" on page 340.
2. In the Function list, select the function in which you want to edit a menu or package.
3. Click the Line Items subview tab.
4. In the line items list, select the menu, package, or component product you want to edit.

5 Change the values of the fields as needed. Some fields are described in the table that follows.

NOTE: The behaviors and calculations of many fields are affected by the menu or package type. For more information about field calculations and behaviors in the various types of menus and packages, see "Menu and Package Types Reference" on page 356.

Field	Comments
Item	Shows an Explorer-type hierarchy. For a single item, displays a document icon. For a menu or package with child items, displays a folder icon. When you add a menu or package as a line item, the whole hierarchy is added and becomes visible. Available selection changes dynamically with the value in the Grouping field. If you try to edit or replace a child item within a menu or package, the Pick Line Item dialog box displays only the items with the same Grouping as the selected menu or package child item. However, if you click Show All Products, the Pick Line Item dialog box displays one of the following lists: ■ If the parent of the selected child item is a package, the Pick Line Item dialog box displays all the items associated with the current property irrespective of their Grouping values. ■ If the parent of the selected child item is a menu, the Pick Line Item dialog box displays all the menu items associated with current property, irrespective of their Grouping values.
Product Type	Read only. Type of menu or package. Determines the pricing method. ■ **Menu Per Person.** One menu for each person. The price can be a fixed price for each person, or a variable price for each person depending on the items selected. ■ **Package Each.** Fixed price for a quantity of 1 of the package, regardless of the number of people. ■ **Package Item Price.** Variable price for each person where individual item prices are broken out. ■ **Package Per Person.** Fixed price for each person where individual item prices are not broken out.
Grouping	Read only. Identifies related groups of products. Allows you to do searches for products classified by related groups. For example, Dinner could be a menu grouping, and this would help you to find all the dinner menus that are available in a property.

Field	Comments
Resource Type	Read only. Possible values are as follows: ■ **Critical.** Item is necessary for an event to occur. The application tries to reserve this item when a quote is created. ■ **General.** Item is noncritical; that is, not necessary for an event to occur. ■ **Non Critical.** Item is noncritical; that is, not necessary for an event to occur.
Qty	How many products are included in this line item.
Extended Quantity	Displays the same value as Qty for parent and static child line items. Calculated for per person child line items. The calculation is parent quantity * child quantity. **NOTE:** The default value of Extended Quantity for a Package Per Person or a Menu Per Person is generated by the value of Best Attendance. For example, when you add a menu per person to a function that has 50 expected attendees, the Extended Quantity for the menu per person defaults to 50 to match the number of attendees. For more information about Best Attendance, see "Best Attendance" on page 358.
Negotiated Price	Price for this line item that has been negotiated with the customer, if different from the List Price. May be a discounted price. The presence of both this field and the Discount Amount field allow you to specify both a discounted price and an amount for a discount, independently of each other, if needed. Editable for line items that have prices, null and read only for fields that do not have prices. For example, in a Package Per Person, the child items are not priced but the parent package is priced. Therefore, in the child items, this field is read only, but in the parent package, this field editable.
Discount Amount	Amount of any discount that may apply to this product. You can specify a Discount Amount or a Discount %, but not both for the same item. If Discount Amount is specified, Discount % is null. The presence of both this field and the Negotiated Price field allow you to specify both a discounted price and an amount for a discount, independently of each other, if needed.
Discount %	Percent of the discount to be applied to a line item price. You can specify a Discount % or a Discount Amount, but not both for the same item. If Discount % is specified, Discount Amount is null.

Field	Comments
Unit Net Price	Calculated, based on Negotiated Price or List Price. If the Negotiated Price is null, the calculation is one of the following: ■ List Price - (List Price * Discount %) ■ List Price - Discount Amount If the Negotiated Price is not null, the calculation is one of the following: ■ Negotiated Price - (Negotiated Price * Discount %) ■ Negotiated Price - Discount Amount
Extended Net Price	Calculated. Displays Unit Net Price * Extended Quantity.
Fixed	Read only. If selected, you cannot add new items to the menu or package, or alter its structure or quantities.
Per Person Allocation	Amount of revenue per person to allocate to a related revenue sub-category. Read only and null for a Package Per Person, Package Each, or Package Item Price. For more information about allocations, see "Revenue Allocations for Menus and Packages" on page 114.
Split Pricing	Applies to menus only. If selected, indicates a split menu. If any of the child menu items has its Split Pricing check box selected, the parent item's Split Pricing check box is selected. Read only at the parent menu level. Editable at the child item level.
Service Charge Inclusive	If selected, the service charge is included in the List Price. If cleared, the List Price does not include the service charge.
Tax Inclusive	If selected, tax is included in the List Price. If cleared, the List Price does not include tax.
Substitutes	Allows you to select from a list of products that can be substituted for the current product, if specified by the administrator. Selecting a substitute product in this field may update other fields in this line item with information from the substitute product record.
Recommendation Message	Read only. Message that you can use to influence a customer to buy the product. For example, if the product is an entree, this field might specify a wine that is compatible.

6 To edit a child item in a menu or package, expand the folder icon in the Item field, and repeat Step 4 and Step 5.

Adding Products to a Menu or Package

You can add more child product items to a menu or package that is associated with a quote or an order.

This task is a step in "Process of Managing Menus and Packages" on page 340.

To add a line item to a menu or package with the New button

1. Display a list of functions associated with quotes or orders. For more information, see "Accessing Quote and Order Functions" on page 340.
2. In the Function list, select the function that contains the menu or package to which you want to add child items.
3. Click the Line Items subview tab.
4. In the line items list, identify the parent menu or package to which you want to add child items.
5. In the line items list, select a child item of the parent menu or package to which you want to add child items.
6. Click New.
7. In the new record, click the Item field's selection box.

   The Pick Line Item dialog box appears.
8. In the Pick Line Item dialog box, do one of the following:
   - If the parent record is a package, in the Type field, select one of the product types listed in the table that follows and click Go.

Type	Comments
Event Order Item	Non-F&B-related simple products.
Menu Item	F&B-related simple products.
Menu Per Person	Menus that provide one menu for each person.
Package Each	Packages with a fixed price for a quantity of 1 of the package, regardless of the number of people.
Package Item Price	Packages with a variable price for each person where individual item prices are broken out.
Package Per Person	Packages with a fixed price for each person where individual item prices are not broken out.

   - If the parent record is a menu, in the Type field, select Menu Item and click Go.
9. In the resulting list, select the item you want to add to the selected menu or package and click OK.

   A new record is added as another child item of the currently selected child item's parent menu or package.

   For example, suppose a parent package named Decor Package has a Centerpiece child item. When you select Centerpiece and click New, the new item is added as a child item of the Decor Package.

Creating a Custom Menu or Package for a Function

In addition to adding existing menus and packages as function line items, and modifying them as necessary, you can create entirely new menus and packages in the Function Line Items views. Menus and packages created in this way will not be available to all functions associated with the current property, but only to the specific function in which you create them.

This task is a step in "Process of Managing Menus and Packages" on page 340.

To create a custom menu or package for a function

1. Display a list of functions associated with quotes or orders. For more information, see "Accessing Quote and Order Functions" on page 340.
2. In the Function list, select the function in which you want to create a custom menu or package.
3. Click the Line Items subview tab.
4. On the Line Items tab, click Menu and choose Create Custom Menu/Package.
5. In the Create Custom Menu/Package dialog box, complete the fields. Some fields are listed in the table that follows.

Field	Comments
Type	Type of menu or package to create. ■ **Menu Per Person.** One menu for each person. The price can be a fixed price for each person, or a variable price for each person depending on the items selected. ■ **Package Per Person.** Fixed price for each person where individual item prices are not broken out. ■ **Package Each.** Fixed price for a quantity of 1 of the package, regardless of the number of people. ■ **Package Item Price.** Variable price for each person where individual item prices are broken out.
Number of Items	Number of child items to be included in the menu or package.

6. Click OK.

   Siebel Hospitality redisplays the Line Items list with the parent menu or package item and its child items that you specified.

7. In each of the new line items, complete the fields as needed.

   For descriptions of some fields in the Function Line Items views, see "Editing Function Menus, Packages, and Line Items" on page 344.

Automatically Calculating System Allocations for Packages

You can have Siebel Hospitality automatically set per person allocations for packages. The application distributes allocations based on revenue contribution percentages calculated from list prices. You can then manually update these automatically calculated per person allocations at any time. You can also overwrite any existing allocations with the system allocations.

The set system allocations functionality is disabled under the following conditions:

- A parent package record is not selected.
- The selected package is or contains a package of the type Package Item Price.
- The selected package contains a split menu.

For more information about revenue allocations and the calculations that Siebel Hospitality performs, see "Revenue Allocations for Menus and Packages" on page 114.

This task is a step in "Process of Managing Menus and Packages" on page 340.

To automatically calculate system allocations for a package

1. Display a list of functions associated with quotes or orders. For more information, see "Accessing Quote and Order Functions" on page 340.
2. In the Function list, select the function in which you want to set system allocations for a package.
3. Click the Line Items subview tab.
4. In the line items list, select the package for which you want to set system allocations.
5. Click Menu and choose Set System Allocation.

   Siebel Hospitality calculates the allocations and updates the appropriate fields in the line item. A per person allocation is calculated for each child item from the parent item's unit net price. The formula is as follows:

   (total of the child item unit net prices) / (unit net price of the child item) * parent package unit net price
6. Click Menu and choose Validate Allocation.

   Siebel Hospitality verifies that the cumulative sum of per person allocations equals the ultimate parent package's unit net price.

Displaying Menu or Package Revenue Estimates

Siebel Hospitality can display an estimate of how much revenue a menu or package associated with a function will yield, and how much revenue each of its individual child items will contribute. For more information about displaying revenue estimates, see "Reviewing Revenue Estimates for Quote Functions" on page 276.

Siebel Hospitality performs revenue calculations as follows:

- **Simple products.** The revenue estimate is based on the extended net price.
- **Menus without split items.** The revenue estimate is based on the extended net price.
- **Split menus.** The revenue is calculated only for the split menu items, based on their respective extended net prices.
- **Packages.** The revenue is calculated for the child package items based on the per person allocation * the extended quantity of the root (ultimate parent) package.

For examples of revenue estimate calculations, see "Revenue Estimate Examples for Menus and Packages" on page 352.

This task is a step in "Process of Managing Menus and Packages" on page 340.

Substituting Products in a Menu or Package

You can view and select all products that are available as substitutes for the child items in a menu or package.

This task is a step in "Process of Managing Menus and Packages" on page 340.

To substitute a product in a menu or package

1. Navigate to the Functions screen, then the Function List view.
2. In the Function list, select the function with the menu or package whose products you want to substitute.
3. Click the Line Items view tab.
4. In the line items list, select the child product of the menu or package for which you want to substitute another product.
5. Click the Substitute Products subview tab.

   If substitute products are available for this product, Siebel Hospitality displays them in the Substitute Products list.
6. Select an item to substitute for the selected Line Items list item and click Substitute.

   The record you selected in the Substitutes list replaces the current function line item.

   NOTE: If the current package or menu's Fixed check box is selected, or if no substitutes are available for the selected item, the Substitute button is disabled.

Looking Up How Many Times a Menu Was Sold

You can look up how many times a menu has been sold to your customers. For example, you might need to know how many times your property's Spring Wedding menu has been sold. Based on the findings, you may want to delete or modify the Spring Wedding menu.

This task is a step in "Process of Managing Menus and Packages" on page 340.

To look up how many times a menu was sold

1. Display a list of functions associated with quotes. For more information, see "To display quote functions" on page 341.
2. In the Function list, select the function associated with the menu whose sales numbers you want to look up.
3. Click the Line Items subview tab.
4. In the line items list, select the menu for which you want to look up how many times it has been sold.
5. Click Menu Match.

   Siebel Hospitality displays the Category Line Items list, which is filtered by the field value criteria listed in the table that follows.

Field	Criteria
Product Type	Menu Per Person or Menu Item
Function Date	Date of the function from which you have navigated
Parent Quote Property	Property associated with the quote from which you have navigated

The Category Line Items list displays all the menus and menu items that have been sold on that day, and their quantities. For example, if the day of the current function is 1/1/09, the list shows all the menus and menu items for all the functions that occur on 1/1/09.

Revenue Estimate Examples for Menus and Packages

The examples in this topic illustrate several system-calculated revenue estimates, as follows:

- "Package Per Person or Package Each Revenue Estimate" on page 353
- "Package Item Price Revenue Estimate" on page 354
- "Menu Per Person Set Price Revenue Estimate" on page 355
- "Menu Per Person Split Price Revenue Estimate" on page 355

Package Per Person or Package Each Revenue Estimate

In this example, the ultimate parent package is a Package Per Person or a Package Each. This ultimate parent package has a unit net price of $75. You must manually set the per person allocations of the child items to equal $75. The quantity of each child item is irrelevant to the revenue estimating process. The line item details of this example are displayed in Table 36.

Table 36. Package Per Person or Package Each Example Details

Level 1	Level 2	Level 3	Unit Net Price	Ext Net Price	Qty	Extended Qty	Per Person Allocation	Revenue Category	Revenue Estimate
Package 1	N/A	N/A	75.00	375.00	1	5	N/A	N/A	N/A
	Event Order Item 1	N/A	N/A	N/A	10	10	20.00	A/V	100.00
	Event Order Item 2	N/A	N/A	N/A	1	1	10.00	A/V	50.00
	Event Order Item 3	N/A	N/A	N/A	1	1	30.00	Rental	150.00
	Package 2	N/A	N/A	N/A	2	2	N/A	N/A	N/A
		Event Order Item 4	N/A	N/A	2	4	5.00	Food	25.00
		Event Order Item 5	N/A	N/A	1	2	10.00	A/V	50.00

The revenue estimates for the various revenue categories are listed in Table 37.

Table 37. Package Per Person or Package Each Example Revenue Estimates

Revenue Categories	Revenue Estimate
A/V	200.00
Rental	150.00
Food	25.00

Package Item Price Revenue Estimate

In this example, the ultimate parent package is a package item price. Siebel Hospitality does pricing and revenue estimating on each child item individually and ignores the parent package item price. The line item details of this example are displayed in Table 38.

Table 38. Package Item Price Example Details

Level 1	Level 2	Level 3	Unit Net Price	Ext Net Price	Qty	Extended Qty	Per Person Allocation	Revenue Category	Revenue Estimate
Package 1	N/A	N/A	N/A	N/A	1	1	N/A	N/A	N/A
	Event Order Item 1	N/A	5.00	50.00	10	10	N/A	A/V	50.00
	Menu	N/A	5.00	100.00	20	20	N/A	Food	100.00
		Menu Item 1	N/A	N/A	1	20	N/A	N/A	N/A
		Menu Item 2	N/A	N/A	1	20	N/A	N/A	N/A
	Package 2		50.00	100.00	2	2	N/A	N/A	N/A
		Event Order Item 2	N/A	N/A	2	4	40.00	Food	80.00
		Event Order Item 1	N/A	N/A	1	2	10.00	Food	20.00

The revenue estimates for the various revenue categories are listed in Table 39.

Table 39. Package Item Price Example Revenue Estimates

Revenue Categories	Revenue Estimates
A/V	50.00
Rental	0
Food	200.00

Menu Per Person Set Price Revenue Estimate

In this example, the parent package is a set price menu. The menu has a price and a revenue category. There are no per person allocations. The revenue estimate equals the extended net price of the menu. The line item details of this example are displayed in Table 40.

NOTE: If the menu is a child item of a Package Each or a Package per Person, it may have a per person allocation. In this case, the revenue estimate is based on the per person allocation.

Table 40. Set Price Menu Example Details

Level 1	Level 2	Extended Net Price	Qty	Extended Qty	Per Person Allocation	Revenue Category	Revenue Estimate
Set Menu	N/A	100.00	1	20	N/A	Food	100.00
	Menu Item 1	N/A	1	20	N/A	N/A	N/A
	Menu Item 2	N/A	1	20	N/A	N/A	N/A

The revenue estimates for the various revenue categories are listed in Table 41.

Table 41. Set Price Menu Example Revenue Estimates

Revenue Categories	Revenue Estimates
A/V	0
Rental	0
Food	100.00

Menu Per Person Split Price Revenue Estimate

In this example, the parent package is a split price menu. The price of the menu depends on the selections the customer makes. Here the customer can either choose Menu Item 1 or Menu Item 2. Each item has a price and a revenue category. The revenue estimate is equal to the extended net price of the split items. The line item details of this example are displayed in Table 42.

Table 42. Split Price Menu Example Details

Level 1	Level 2	Split	Split Price	Extended Price	Qty	Extended Qty	Per Person Allocation	Revenue Category	Revenue Estimate
Split Menu	N/A	N/A	N/A	N/A	1	1	N/A	N/A	N/A
	Menu Item 1	Yes	50.00	1000.00	20	20	N/A	Food	1000.00
	Menu Item 2	Yes	40.00	1200.00	30	30	N/A	Food	1200.00

The revenue estimates for the various revenue categories are listed in Table 43.

Table 43. Split Price Menu Example Revenue Estimates

Revenue Categories	Revenue Estimates
A/V	0
Rental	0
Food	2200.00

Menu and Package Types Reference

The following topics provide examples and details of the various types of property-specific menus and packages, as follows:

- "Package Per Person Reference" on page 356
- "Package Item Price Reference" on page 360
- "Package Each Reference" on page 363
- "Menu Per Person, Set Price Reference" on page 365
- "Menu Per Person, Split Price Reference" on page 368

Package Per Person Reference

A Package Per Person provides a method of mixing different types of items, such as a Package Each and a Per Person, into one package. In this way, a Package Per Person can show a realistic representation of child menus or packages broken into a per person basis, while taking into account static price items.

Package Per Person Example

In a Package Per Person, the Unit Net Price, Extended Price, Negotiated Price, Discount %, and Net Discount values apply only to the parent package. For child items, these values are not displayed and the fields are read only.

Table 44 shows an example of a package per person with an expected quantity of 50.

Table 44. Example of Package Per Person

Parent	Child	Quantity	Extended Quantity[1]	List Price	UOM	Unit Net Price	Extended Price	Negotiated Price	Discount %	Net Discount	Per Person Allocation
Package	N/A	50	50	60.00	Person	60.00	3000.00	0	0	0	N/A
	Menu	1	50	50.00	Person	N/A	N/A	N/A	N/A	N/A	30.00
	A/V	1	1	400.00	Each	N/A	N/A	N/A	N/A	N/A	15.00
	Ice Sculpture	2	2	100.00	Each	N/A	N/A	N/A	N/A	N/A	15.00

1. Calculated rollup

Package Per Person Field Behaviors

This topic describes the behaviors and the internal calculations that Siebel Hospitality performs for selected fields in a Package Per Person and its child items. These behaviors are typical of the Package Per Person package type.

Quantity

For the parent package, set to the # Guaranteed or Expected, in that order, when either of these fields is changed. If Guaranteed is null, Expected is used. For child items, defaults to the value set up by the administrator.

Extended Quantity

For the parent package and static child items, displays the same value as Quantity. For each child line item that is a per person item (that is, where UoM = Person), Extended Quantity is calculated as parent Quantity * child item Quantity, where parent Quantity = Best Attendance. For the parent package and static child line items, this calculation is not done and the Extended Quantity is the same as Quantity.

The Quantity of the parent item and of the child items can also be manually modified. If the parent is a package per person, the parent Quantity behaves as if the UoM = Person even if this is not explicitly specified on the parent record.

Using example values from Table 44 on page 357, the Extended Quantity is calculated as shown in Table 45.

Table 45. Extended Quantity Calculations Example

Parent	Child	UOM	Quantity	Calculation	Extended Quantity
Package	N/A	Person	50	50	50
	Menu	Person	1	1 * 50	50
	A/V	Each	1	1 * 1	1
	Ice Sculpture	Each	2	2 * 1	2

Best Attendance

If Actual is not null, Best Attendance = Actual. If Actual is null and Guaranteed is not null, Best Attendance = Guaranteed. If Actual and Guaranteed are both null and Projected is not null, Best Attendance = Projected. If Actual, Guaranteed, and Projected are all null, Best Attendance = Expected.

Unit Net Price

Unit Net Price is calculated as follows:

If Negotiated Price is null, the calculation is one of the following:

- List Price - (List Price * Discount %)
- List Price - Discount Amount

If Negotiated Price is not null, the calculation is one of the following:

- Negotiated Price - (Negotiated Price * Discount %)
- Negotiated Price - Discount Amount

Extended Net Price

Extended Net Price is calculated as Extended Quantity * Unit Net Price for both the parent package and the child line items.

Using example values from Table 44 on page 357, the Extended Price is calculated as shown in Table 46.

Table 46. Extended Price Calculations Example

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Price
Package	N/A	50	60.00	50 * 60	$3000.00
	Menu	50	50.00	50 * 50	$2500.00
	A/V	1	400.00	1 * 400	$400.00
	Ice Sculpture	2	100.00	2 * 200	$200.00

Discount %

Percent of the discount to be applied to a line item price. You can specify a Discount % or a Discount Amount, but not both for the same item. If Discount % is specified, Discount Amount is null.

Discount Amount

Amount of the discount to be applied to a line item price. You can specify a Discount % or a Discount Amount, but not both for the same item. If Discount Amount is specified, Discount % is null.

Non Discounted Extended Price

If Negotiated Price is null, the value is calculated as List Price * Extended Qty. If Negotiated Price is not null, the value is calculated as Negotiated Price * Extended Qty.

Net Discount

The value is calculated as Non Discounted Extended Price - Extended Net Price.

Per Person Allocation

For the parent package, this field is read-only and null, because allocations are normally calculated for the child records. For a per person child item, holds the allocated value of the revenue from that item. For child items, this value defaults to the allocations defined by the administrator. For the package, the value equals the Net Price. End users can update the child items' Per Person Allocation fields.

CAUTION: When a discount is applied to a package, the List Price will not equal the Net Price, so these numbers must be manually adjusted to make sure the child item allocations add up to the Allocated value for the package.

Function Total

The Function Total field is located in the function record, and shows total value of the function. The value in this field includes the extended net prices of the parent package and does not include the extended net prices of the child package items.

Package Item Price Reference

In a Package Item Price, pricing occurs on a unit basis. The Total Header Price is not displayed on the Event Order Report or in the Siebel Hospitality UI. The child line item prices are displayed on the BEO Report. Discounts are applied to individual child line items, and their net results will be displayed through the Unit Net Price.

Package Item Price Example

A typical example of an item price package is a Cash Bar. As shown in Table 47, the Unit Net Price, Extended Price, Discount %, Net Discount, and Per Person Allocation fields are Null and read-only for the parent package. These fields apply only to the child line items.

Table 47. Example of Package Item Price

Parent	Child	Quantity	Extended Quantity	List Price	UOM	Unit Net Price	Extended Price	Discount %	Net Discount	Per Person Allocation
Package	N/A	1	1	N/A	Each	N/A	N/A	N/A	N/A	N/A
	Beer	1	1	5	Each	5.00	5.00	0%	0	N/A
	Wine	1	1	10	Each	10.00	5.00	50%	5.00	N/A
	Cordials	1	1	3	Each	3.00	3.00	0%	0	N/A

Package Item Price Field Behaviors

This topic describes the behaviors and the internal calculations that Siebel Hospitality performs for selected fields in a Package Item Price and its child items. These behaviors are typical of the Package Item Price package type.

Extended Quantity

Because only static child line items exist in a Package Item Price package, the Extended Quantity for the parent package equals the Quantity. The Extended Quantity for a child line item is calculated as Parent Quantity * Child Quantity.

Using values from Table 47 on page 360, the Extended Quantities are calculated as shown in Table 48.

Table 48. Extended Quantity Calculations Example 1

Parent	Child	Quantity	Extended Quantity
Cash Bar	N/A	1	1
	Beer	1	1
	Wine	1	1
	Cordials	1	1

If the parent package quantity is 4, the Extended Quantities are calculated as shown in Table 49.

Table 49. Extended Quantity Calculations Example 2

Parent	Child	Quantity	Extended Quantity
Cash Bar	N/A	4	4
	Beer	1	4
	Wine	1	4
	Cordials	1	4

For a child item that is a complex product with UoM = Person under the Package Item Price and # of Attendees = 30, the Extended Quantities are calculated as shown in Table 50.

Table 50. Extended Quantity Calculations Example 3

Parent	Child	Grandchild	Quantity	Extended Quantity
Cash Bar	N/A	N/A	1	1
	Menu Per Person	N/A	30	30
		Wine	1	30
		Chicken	1	30

Unit Net Price

For Package Item Price packages, the Unit Net Price calculation occurs only at the child item level. The Unit Net Price for a child line item is calculated as Parent Quantity * Child List Price.

Using values from Table 47 on page 360, the Unit Net Prices are calculated as shown in Table 51.

Table 51. Unit Net Price Calculations Example

Parent	Child	List Price	Quantity	Calculation	Unit Net Price
Cash Bar	N/A	N/A	1	N/A	$18.00
	Beer	$5.00	1	5 x 1	$5.00
	Wine	$10.00	1	10 x 1	$10.00
	Cordials	$3.00	1	3 x 1	$3.00

Extended Net Price

For Package Item Price packages, the Extended Net Price calculation occurs only on the child level. The Extended Net Price for a child line item is calculated as Child Extended Quantity * Child Unit Net Price.

Using values from Table 47 on page 360, the Unit Net Prices are calculated as shown in Table 52.

Table 52. Extended Net Price Calculations Example

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Net Price
Cash Bar	N/A	1	N/A	N/A	N/A
	Beer	3	$5.00	3 * 5	$15.00
	Wine	1	$10.00	1 * 10	$10.00
	Cordials	1	$3.00	1 * 3	$3.00

Per Person Allocation

For Package Item Price packages, the Per Person Allocation calculation occurs only on the child level. A child line item's Per Person Allocation field may or may not have a value, based on its Product Type. For example, if the child item is a Menu, the Per Person Allocation field is not used. If, however, the child item is a Package Per Person, then its Per Person Allocation field follows the Package Per Person rules. That is, the total Per Person Allocation sums up to the Net Price of the Package Per Person.

Function Total

The Function Total field is located in the function record. This field shows the total value of the function. The Function Total field value includes the Extended Net Prices of the child items, but not the Extended Net Price of the parent package, which is null.

Package Each Reference

Package Each is the reverse of Package Item Price and similar to the Package Per Person. The Total Header Price is required, while the child line item prices do not roll up to the parent price. However, unlike the Package Per Person, all child line items of a Package Each must be of UoM = Each.

Package Each Example

In a Package Each, the Unit Net Price, Extended Price, Negotiated Price, Discount %, and Net Discount values apply only to the parent package. For child items, these values are not displayed and the fields are read only.

Table 53 shows an example of a package each with an expected quantity of 10.

Table 53. Example of Package Each

Parent	Child	Quantity	Extended Quantity	List Price	UOM	Negotiated Price	Discount %	Unit Net Price	Extended Net Price	Net Discount	Per Person Allocation
Package	N/A	20	20	160.00	Each	150.00	10%	$135.00	$2700.00	300.00	
	Speaker	1	20	50.00	Each	N/A	N/A	N/A	N/A	N/A	100.00
	Projector	1	20	70.00	Each	N/A	N/A	N/A	N/A	N/A	30.00
	Flip Chart	1	20	40.00	Each	N/A	N/A	N/A	N/A	N/A	5.00

Package Each Field Behaviors

This topic describes the behaviors and the internal calculations that Siebel Hospitality performs for selected fields in a Package Each and its child items. These behaviors are typical of the Package Each package type.

Extended Quantity

Because only static child line items exist in an Package Each package, the Extended Quantity for the parent package equals the Quantity. However, in each child line item, the Extended Quantity equals Parent Quantity * Child Quantity.

Using values from Table 53 on page 363, the Unit Net Prices are calculated as shown in Table 54.

Table 54. Extended Quantity Calculations Example

Parent	Child	Quantity	Extended Quantity
Package	N/A	20	20
	Speaker	1	20
	Projector	1	20
	Flip Chart	1	20

Unit Net Price

Unit Net Price is calculated as follows:

If Negotiated Price is null, the calculation is one of the following:

- List Price - (List Price * Discount %)
- List Price - Discount Amount

If Negotiated Price is not null, the calculation is one of the following:

- Negotiated Price - (Negotiated Price * Discount %)
- Negotiated Price - Discount Amount

Using values from Table 53 on page 363, the Unit Net Prices are calculated as shown in Table 55.

Table 55. Unit Net Price Calculations Example

Parent	Child	List Price	Negotiated Price	Discount %	Calculation	Unit Net Price
Package	N/A	$160.00	150.00	10	150 - 10%(150)	$135.00
	Speaker	$50.00	40.00	N/A	40	$40.00
	Projector	$70.00	N/A	N/A	70	$70.00
	Flip Chart	$40.00	30.00	N/A	40	$30.00

Extended Net Price

The Extended Net Price is calculated as Extended Quantity * Unit Net Price for both the parent package and the child line items.

Using values from Table 53 on page 363, the Unit Net Prices are calculated as shown in Table 56.

Table 56. Extended Net Price Calculations Example

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Net Price
Package	N/A	20	$135.00	20 * 135	$2700.00
	Speaker	20	$40.00	20 * 40	$800.00
	Projector	20	$70.00	20* 70	$1400.00
	Flip Chart	20	$30.00	20* 30	$600.00

Per Person Allocation

For child items, this value defaults to the allocations defined for the item by the administrator. You can update this value manually.

Function Total

The Function Total field is located in the function record. This field shows the total value of the function. The Function Total field value includes the Extended Net Price of the parent package, but not the Extended Net Prices of the child items.

Menu Per Person, Set Price Reference

The Menu Per Person, Set Price menu type is used when you can estimate an expected number of guests. The calculations are different from a Menu Per Person, Split Price and are controlled by the Split flag value = N. In Menu Per Person, Set Price, Siebel Hospitality adds the menu prices together and displays them on a per person basis. Actual child line item quantities are reflected in the Extended Quantity fields. The child prices do not roll up to the parent price.

Menu Per Person, Set Price Example

In a Menu Per Person, Set Price, the Unit Net Price, Extended Price, Negotiated Price, Discount %, and Net Discount values apply only to the parent package. For child items, these values are not displayed and the fields are read only.

Table 57 shows an example of a menu per person, set price with an expected quantity of 10.

Table 57. Example of Menu Per Person, Set Price

Parent	Child	Quantity	Extended Quantity	List Price	UOM	Unit Net Price	Negotiated Price	Extended Price	Discount %	Net Discount	Per Person Allocation
Menu	N/A	10	10	50.00	Person	50.00	N/A	500.00	0	0	N/A
	Chicken	1	10	30.00	Person	N/A	N/A	N/A	N/A	N/A	25.00
	Salad	1	10	20.00	Person	N/A	N/A	N/A	N/A	N/A	12.50
	Dessert	1	10	15.00	Person	N/A	N/A	N/A	N/A	N/A	12.50

Menu Per Person, Set Price Field Behaviors

This topic describes the behaviors and the internal calculations that Siebel Hospitality performs for selected fields in a Menu Per Person, Set Price and its child items. These behaviors are typical of the Menu Per Person, Set Price menu type.

Best Attendance

If Actual is not null, Best Attendance = Actual. If Actual is null and Guaranteed is not null, Best Attendance = Guaranteed. If Actual and Guaranteed are null and Projected is not null, Best Attendance = Projected. If Actual, Guaranteed, and Projected are all null, Best Attendance = Expected.

Extended Quantity

The Extended Quantity is calculated as Parent Quantity * Item Quantity, where Parent Quantity = Best Attendance, for each child line item regardless of its UOM. You can manually modify the Extended Quantity of the parent and its child items.

For the parent package and static child line items, Siebel Hospitality does not perform this calculation, and Extended Quantity is the same as Quantity. Usually, all products associated with a Menu Per Person, Set Price have UOM = Person.

Using values from Table 57 on page 366, the Unit Net Prices are calculated as shown in Table 58.

Table 58. Extended Quantity Calculations Example

Parent	Child	Quantity	Calculation
Menu	N/A	10	10
	Chicken	1	1 * 10
	Salad	1	1 * 10
	Dessert	1	1 * 10

Unit Net Price

Unit Net Price is calculated as follows:

If Negotiated Price is null, the calculation is one of the following:

- List Price - (List Price * Discount %)
- List Price - Discount Amount

If Negotiated Price is not null, the calculation is one of the following:

- Negotiated Price - (Negotiated Price * Discount %)
- Negotiated Price - Discount Amount

Using values from Table 57 on page 366, the Unit Net Prices are calculated as shown in Table 59.

Table 59. Unit Net Price Calculations Example

Parent	Child	List Price	Discount %	Calculation	Unit Net Price
Menu	N/A	50.00	10	50 - 5	45.00
	Chicken	30.00	N/A	N/A	N/A
	Salad	20.00	N/A	N/A	N/A
	Dessert	15.00	N/A	N/A	N/A

Extended Price

Extended Price is calculated as Extended Quantity * Unit Net Price for the parent menu. For the child line items, Extended Price is null and read only.

Using values from Table 57 on page 366, the Extended Price is calculated as shown in Table 60.

Table 60. Extended Price Calculations Example

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Price
Menu	N/A	10	45.00	10 * 45	$450.00
	Chicken	10	N/A	N/A	N/A
	Salad	10	N/A	N/A	N/A
	Dessert	10	N/A	N/A	N/A

Function Total

The Function Total field is located in the function record. This field shows the total value of the function. The Function Total field value includes the Extended Net Price of the parent menu, but not the Extended Net Prices of the child items.

Menu Per Person, Split Price Reference

A Menu Per Person, Split Price can have a choice of items. The calculations are different from a Menu Per Person, Set Price and are controlled by the Split flag value = Y.

Menu Per Person, Split Price Example

Table 61 shows an example of a menu per person, split price with 10 expected attendees, who order 3 menus with a Chicken entree and 7 menus with a Beef entree.

Table 61. Example of Menu Per Person, Split Price

Parent	Child	Quantity	Extended Quantity	Split Pricing	List Price	UOM	Unit Net Price	Negotiated Price	Extended Net Price	Discount %	Net Discount	Per Person Allocation
Menu	N/A	10	10	N/A		Person	50.00	N/A	N/A	N/A	N/A	N/A
	Chicken	3	3	Y	30.00	Person	27.00	30.00	81.00	10	9.00	27.00
	Beef	7	7	Y	20.00	Person	20.00	20.00	140.00	N/A	N/A	20.00
	Dessert	10	10	N/A	N/A	Person	N/A	N/A	N/A	N/A	N/A	N/A

Menu Per Person, Split Price Field Behaviors

This topic describes the behaviors and the internal calculations that Siebel Hospitality performs for selected fields in a Menu Per Person, Split Price and its child items. These behaviors are typical of the Menu Per Person, Split Price menu type.

Quantity

In a Menu Per Person, Split Price, the Quantity of the menu items defaults to 1. After adding a Menu Per Person, Split Price menu to an event, update the Qty fields manually to reflect the number of menus with that item that the guests want to order.

Best Attendance

If Actual is not null, Best Attendance = Actual. If Actual is null and Guarantee is not null, Best Attendance = Guaranteed. If Actual and Guaranteed are null and Projected is not null, Best Attendance = Projected. If Actual, Guaranteed, and Projected are all null, Best Attendance = Expected.

Extended Quantity for Non-Split Items

Extended Quantities for non-split menu items and for split menu items are calculated as follows:

- **Non-split items.** Extended Quantity is calculated as Parent Quantity * Child Item Quantity, where Parent Quantity = Best Attendance, for each child line item that is a per person item. You can manually modify the Quantity of the parent and the child items.
- **Split items.** Extended Quantity is equal to Quantity.

Using values from Table 61 on page 368, the Extended Quantity is calculated as shown in Table 62.

Table 62. Extended Quantity Calculations Example

Parent	Child	Split Pricing	Quantity	Calculation for Extended Quantity
Split Menu	N/A	N/A	10	10
	Chicken	Y	3	3
	Beef	Y	7	7
	Dessert	N/A	1	1 * 10

Unit Net Price

Unit Net Price is calculated as follows:

If Negotiated Price is null, the calculation is one of the following:

- List Price - (List Price * Discount %)
- List Price - Discount Amount

If Negotiated Price is not null, the calculation is one of the following:

- Negotiated Price - (Negotiated Price * Discount %)
- Negotiated Price - Discount Amount

Using values from Table 61 on page 368, the Unit Net Prices are calculated as shown in Table 63.

Table 63. Unit Net Price Calculations Example

Parent	Child	Split Pricing	List Price	Discount %	Calculation	Unit Net Price
Split Menu	N/A	N/A	N/A	N/A	N/A	N/A
	Chicken	Y	30.00	10	30 - (30 x 0.1)	27.00
	Beef	Y	20.00	N/A	20	20.00
	Dessert	N/A	15.00	N/A	N/A	N/A

Extended Net Price

The Extended Net Price is calculated as Extended Quantity * Unit Net Price for both the parent menu and the child line items.

Using values from Table 61 on page 368, the Unit Net Prices are calculated as shown in Table 64.

Table 64. Extended Net Price Calculations Example

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Net Price
Split Menu	N/A	10	50.00	10 * 50	$500.00
	Chicken	3	27.00	3 * 30	$81.00
	Beef	7	20.00	7 * 20	$140.00
	Dessert	10	N/A	N/A	N/A

Function Total

The Function Total field is located in the function record. This field shows the total value of the function. The Function Total field value includes the Extended Net Prices of the split menu child items, but not the parent menu.

21 Managing Nonparticipating Properties

This chapter describes the procedures that administrators and end users, such as sales representatives, sales managers, and event managers perform to manage nonparticipating properties using Siebel Hospitality. It includes the following topics:

- About Nonparticipating Properties on page 371
- Process of Managing Nonparticipating Properties on page 372
- Setting Up Nonparticipating Properties on page 372
- Opportunities for Nonparticipating Properties Development Process on page 372
- Generating Quotes for Nonparticipating Properties on page 373
- Quotes Associated with Nonparticipating Properties Finalization Process on page 375
- About Orders and Nonparticipating Properties on page 376

About Nonparticipating Properties

Nonparticipating properties (NPPs) are properties that do not use the Hospitality Event Sales Execution, Central Reservation System, or Function Space Inventory processes. However, events for these properties may be sold by a member of the property brand and the National Sales Organization (NSO). Event Booking Centers (EBC) sell space from and pass event opportunities to NPPs.

When you, as the administrator, create property records, you can flag a property as nonparticipating. Flagging a property in this manner has ongoing effects for end users when they work with opportunities and quotes for the property. For example, when you create an NPP, it is advised that only one sleeping room, one function space, and one catering product is created, as you do not have full details of what is available at the NPP. This means that only one type of sleeping room, function space, and catering product can be added to a quote for an NPP when it is generated from an opportunity.

When a property is designated as a nonparticipating property, all availability checks (for function spaces and sleeping rooms) and pricing features are disabled. This means that when a quote is generated from an opportunity for a nonparticipating property, the sales representative needs to manually update line item room nights, functions agendas, status, and revenue for the opportunity and quote. Also, asset checks are not carried out for assets associated with a function.

After a quote for an NPP has been fully created and all the information about the quote has been created, the sales representative can send an email to the NPP so that a representative for the NPP can confirm that the details of the quote are accurate. It is also possible to send a quote evaluation to the NPP by email, so that the quote can be evaluated by the NPP. There are templates present in Hospitality that extract the required information from the quote Summary and Evaluations form. If necessary you can create more templates from the Administration > Communications > All Templates > Simple view.

Process of Managing Nonparticipating Properties

This topic lists the tasks typically performed by event managers, sales managers, and sales representatives when managing nonparticipating properties. Your company may follow a different process according to its business requirements.

To manage nonparticipating properties, perform the following procedures:

- Opportunities for Nonparticipating Properties Development Process on page 372
- Generating Quotes for Nonparticipating Properties on page 373
- Quotes Associated with Nonparticipating Properties Finalization Process on page 375
- About Orders and Nonparticipating Properties on page 376

NOTE: Nonparticipating-property records must be set up by the administrator. For instructions on creating such records, see Setting Up Nonparticipating Properties on page 372.

Setting Up Nonparticipating Properties

Nonparticipating properties are set up by the administrator when the property records are created in the system. For more information about setting up nonparticipating properties, see Setting Up Nonparticipating Properties on page 39.

When you have identified a property as nonparticipating, it is advised that you create one function space, one sleeping room, and one catering product, which can be used when an opportunity is generated from a quote. For more information about adding function spaces, sleeping rooms, and catering products to a property record, see Chapter 5, "Setting Up Function Spaces, Sleeping Rooms, and Suites."

This task is a step in Process of Managing Nonparticipating Properties on page 372.

Opportunities for Nonparticipating Properties Development Process

Opportunities for nonparticipating properties are developed and detailed in the same manner as any other opportunity. The following tasks are carried out:

1. The sales representative creates the opportunity with all irrelevant details.
2. The sales representative adds a function agenda.
3. The sales representative adds room block information and room blocks.
4. The sales representative adds extra information, such as notes, attachments, activities, billing information, and so on.
5. The sales representative selects a nonparticipating property for which a quote may be generated.
6. The sales representative generates a quote.

For more information about each of these tasks, see Process of Capturing Hospitality Opportunities on page 198.

Generating Quotes for Nonparticipating Properties

For nonparticipating properties, generic products (line items and room blocks) are not mapped to property-specific products. Instead, the generic agenda is replicated in the quote's line items view. When a quote is generated for a nonparticipating property, the National Sales Organization, Event Booking Center, or whoever creates the quote must provide details to the NPP about the opportunity, and must then request pricing and availability information.

When a quote is generated for a nonparticipating property, the following tasks are carried out:

1. Function agenda and Room Block Information is copied from the opportunity to the quote.
2. Notes, attachments, and activities are copied from the opportunity to the quote.
3. Availability, pricing, average values, and asset inventory checks are bypassed. No revenue rollup occurs.
4. The sales representative sends the quote information to the nonparticipating property using either fax or email. For more information, see Sending a Quote Summary to the NPP on page 374.
5. A representative at the nonparticipating property then completes the information and returns it to the Event Booking Center or National Sales Organization.
6. Before the quote is turned definite, it must be evaluated by the NPP. The sales representative sends the quote evaluation information to the nonparticipating property using either fax or email. For more information, see Sending a Quote Evaluation to the NPP on page 375.
7. The nonparticipating property then evaluates the information and returns it to the Event Booking Center or National Sales Organization.

After the quote has been generated for an NPP, the sales representative should be aware of the following:

- At this stage the sales representative should add one room block and one function space if they are not already present. The sales representative can also add NPP-specific critical and noncritical products and assets. For more information, see Managing Functions Associated with Quotes on page 257 and Managing Event Room Block Information in Quotes on page 261.
- The following buttons are not available for use: Reprice, Reprice All, and Refresh, as pricing and rollup is not available for NPPs.
- Clicking the Reserve button for functions toggles the function between an inventory status of Reserved and Unreserved.
- If you use the AutoBook functionality for quote function line items associated with nonparticipating properties, critical resource toggles between a status of Booked and Not Booked.
- Clicking the Reserve button for room block line items toggles inventory status between a status of Reserved and Unreserved.

- Time shifting of Function Spaces and Room Blocks is not supported for NPPs.
- If a function time is changed, then no availability check for the function space is launched.
- If you cancel a function, all of its line items are automatically unreserved.
- If you cancel a room block or line item, then the appropriate items are all unreserved.
- The sales representative fills in summary information to the Quote Summary Revenue Form when all other quote details have been completed. For nonparticipating properties, you can fill in the following fields: Total Profit, Total Revenue, Sleeping Room Profit, Sleeping Room Revenue, Function Space Profit, Function Space Revenue, Required Thresholds, and Threshold Profit Variance. You can also edit the Revenue Categories and Negotiation lists.
- For nonparticipating properties, the “Update Quote Status - Time Based” and “Update Quote Status - Date Bases” workflows are not triggered.

Sending a Quote Summary to the NPP

A quote summary is sent to an NPP by email when all the details about the quote have been entered. After this information has been sent, a representative from the NPP can send feedback on the quote summary to the sales representative.

NOTE: In order to carry out the following procedure, email integration must be enabled. For more information about setting up email integration, see *Siebel Communications Server Administration Guide*.

To send quote summary information to an NPP

1. Navigate to the Quotes screen > Quotes list view.
2. In the Quotes list, query for and select the required quote.
3. Click the link in the Name field, and then click the Summary tab.
4. From the File menu, choose Send Email.

   The Send Email window is displayed.
5. Click the drop-down arrow in the body field, and select Quote Summary (eHospitality).
6. Enter the email address of the person that you wish to send the email to at the NPP, and then click Send.

   The email is sent to the required person.

Sending a Quote Evaluation to the NPP

A quote evaluation is sent to an NPP by email before the quote can be turned definite. After this information has been sent, a representative from the NPP can evaluate the quote and return the evaluation to the sales representative.

NOTE: In order to carry out the following procedure, email integration must be enabled. For more information about setting up email integration, see *Siebel Communications Server Administration Guide*.

To send quote summary information to an NPP

1. Navigate to the Quotes screen > Quotes list view.
2. In the Quotes list, query for and select the required quote.
3. Click the link in the Name field, and then click the Evaluations tab.
4. From the File menu, choose Send Email.

   The Send Email window is displayed.
5. Click the drop-down arrow in the body field, and select Quote Evaluation (eHospitality).
6. Enter the email address of the person that you wish to send the email to at the NPP, and then click Send.

   The email is sent to the required person.

Quotes Associated with Nonparticipating Properties Finalization Process

The process of finalizing a quote for a nonparticipating property is the same as that for any other quote, and the following tasks are performed:

1. The sales representative generates an agreement based on the existing information for the quote.
2. The customer accepts the quote and sends back the signed contract.
3. The sales representative turns the quote to a status of Definite. In order to turn the quote to Definite, all function and room block line items must have a status of Reserved. However, if the function or room block has been cancelled, then these line items may have a status of Unreserved.
4. All other properties for the quote are automatically turned to a status of Lost.
5. If the sales representative changes the status of the quote to Lost or Turndown, then all inventory associated with the quote is released.
6. The sales representative completes the turnover checklist.
7. The sales representative passes the turnover checklist on to the nonparticipating property.

For more information about each of these tasks, see Process of Finalizing a Quote and Managing Turnover on page 428.

About Orders and Nonparticipating Properties

Orders for nonparticipating properties are handled in a similar way as other orders. For more information, see Process of Generating and Managing Event Orders on page 439. This process is as follows:

1. The sales representative generates a primary order.
2. The sales representative generates function orders.
3. (Optional) The sales representative changes the primary event order associated with a function.
4. The sales representative associates event orders with a function line item.
5. The sales representative creates functions from the orders screen.
6. The sales representative can view all line items associated with an order.
7. The sales representative adds notes to an order.
8. The sales representative adds attachments to an order.

However, there are a number of differences when dealing with orders for nonparticipating properties than with orders for participating properties as follows:

- Pricing for orders associated with NPPs does not work.
- Autobooking of critical resources does not work, as availability checks are not performed.
- Event Checks are not generated for orders associated with NPPs.
- At the Order stage for NPPs, functions cannot be optioned or overbooked, and cannot use the next fit functionality. This means that the Option, Overbook, and Next Fit buttons are disabled for order functions associated with NPPs.
- At the Order stage for NPPs, function line items cannot be double-booked, and it is not possible to reprice items. This means that the Double Book, Reprice, and Reprice All buttons are disabled for order line items associated with NPPs.

22 Using the Function Space Diary

This chapter describes the features of the Function Space Diary and the procedures that end users perform to use the diary. It includes the following topics:

- Process of Using the Function Space Diary on page 378
- Function Space Diary Overview on page 378
- Using Drag and Drop Operations in the Function Space Diary on page 393
- Viewing Floor Plans in the Function Space Diary on page 396
- Changing Bookings in the Function Space Diary on page 397
- Querying the Function Space Diary on page 399
- Navigating to the Function Space Diary on page 402
- Navigating from the Function Space Diary on page 403
- Printing from the Function Space Diary on page 404

NOTE: This chapter discusses the interpretation of color indicators in the Function Space Diary. If the end user cannot view color indicators, refer to *Accessibility Guide for Siebel Business Applications*.

Process of Using the Function Space Diary

This topic lists the tasks typically performed by sales representatives, event managers, and revenue managers when managing bookings from the Function Space Diary. Your company may follow a different process according to its business requirements.

To manage bookings from the Function Space Diary, perform the following procedures:

- Using Drag and Drop Operations in the Function Space Diary on page 393
- Viewing Floor Plans in the Function Space Diary on page 396
- Changing Bookings in the Function Space Diary on page 397
- Querying the Function Space Diary on page 399
- Navigating to the Function Space Diary on page 402
- Printing from the Function Space Diary on page 404

NOTE: Before you can use the Function Space Diary, an administrator must define property day parts and function space and asset inventory status indicators. The administrator must also add property floor plans. For more information, see Chapter 4, "Setting Up Properties" and Chapter 9, "Defining Day Parts, Status Indicators, and Setup Style Translations."

Function Space Diary Overview

The *Function Space Diary* is a Gantt chart used by sales representatives, event managers, and revenue managers to manage day-to-day bookings of function space and to optimize event operations. The Gantt chart displays the allocation of resources across time. For example:

- Sales representatives use the diary to verify the availability of function space.
- Event managers use the diary to view availability and achieve operational efficiency for an event. For example, event managers might use the diary to identify events that have multiple food and beverage requirements and relocate those events to function spaces close to the kitchen.
- Revenue managers use the diary to review function space availability as an indicator of future revenue and to develop recommendations on how function space can be used to bring in additional revenue for the property. The process of assigning category bookings to specific space is also managed by the revenue managers.

The Function Space Diary shows function space bookings over various time periods and allows event personnel to change the time scale. They can, for example, filter the data shown by start date, time scale, display, and turn times. Color coding indicators differentiate between weekdays, weekends, and holidays.

The following sections discuss the use of the Function Space Diary:

- Visibility Rules and the Function Space Diary on page 379
- Function Space Diary Views on page 380
- Function Space Diary View Elements on page 382

■ Viewing Function and Booking Details in the Function Space Diary on page 383

Visibility Rules and the Function Space Diary

The information that can be viewed in the Function Space Diary depends on the user's assigned responsibility, and associated visibility rules. The appropriate views must be added to each responsibility. Table 65 lists user responsibilities and the type of records they are able to access according to the visibility rule associated with each responsibility.

In the diary, each user is given the maximum possible visibility by default. For example, if a property user goes to a diary view, this user can only view bookings made for the property assigned to him.

Table 65. User Visibility

User	Visibility Rule
Property user	Users that have a specific property assigned to them can see only bookings relating to that particular property.
Cluster user	Users that are members of a specific cluster can see only bookings that relate to that particular cluster.
Administrator user	Administrators can see bookings for all appropriate organization properties.

See *Using Siebel Tools* for more information on how to add views to user responsibilities.

Typically, users (for example, a sales representative) can view diary information for their own assigned properties as well as any properties assigned to a cluster with which their login ID is associated. Administrators can typically view diary information for properties across all organizations.

NOTE: Clusters can be used to prevent hotels of the same chain from viewing each other's Function Space Diary, thereby gaining an inappropriate competitive advantage.

Related Topics

■ Assigning Clusters to a User on page 52

■ Updating the Property Team on page 41

■ Using Cluster Visibility on page 52

Function Space Diary Views

Figure 12 shows the one-day time scale in the Function Space Diary, with the Property form at the top of the screen and the Sales/Execution Diary, Revenue Management, Compact Diary, and Total Availability view tabs. The Property form shows the name and type, the number of function rooms, and number of sleeping rooms for the first property record. From the form, users can query for a different property.

The Function Space Diary's Compact Diary view is shown in Figure 13. Unlike the other diary views, the function spaces are not grouped according to category, but instead are grouped according to their parent-child relationships (biggest parent, smallest child on the y-axis).

NOTE: Associated functions do not appear for nonparticipating properties. If users query for a nonparticipating property within the Function Space Diary, the views contain no information. See Adding Property Records on page 36 for more information.

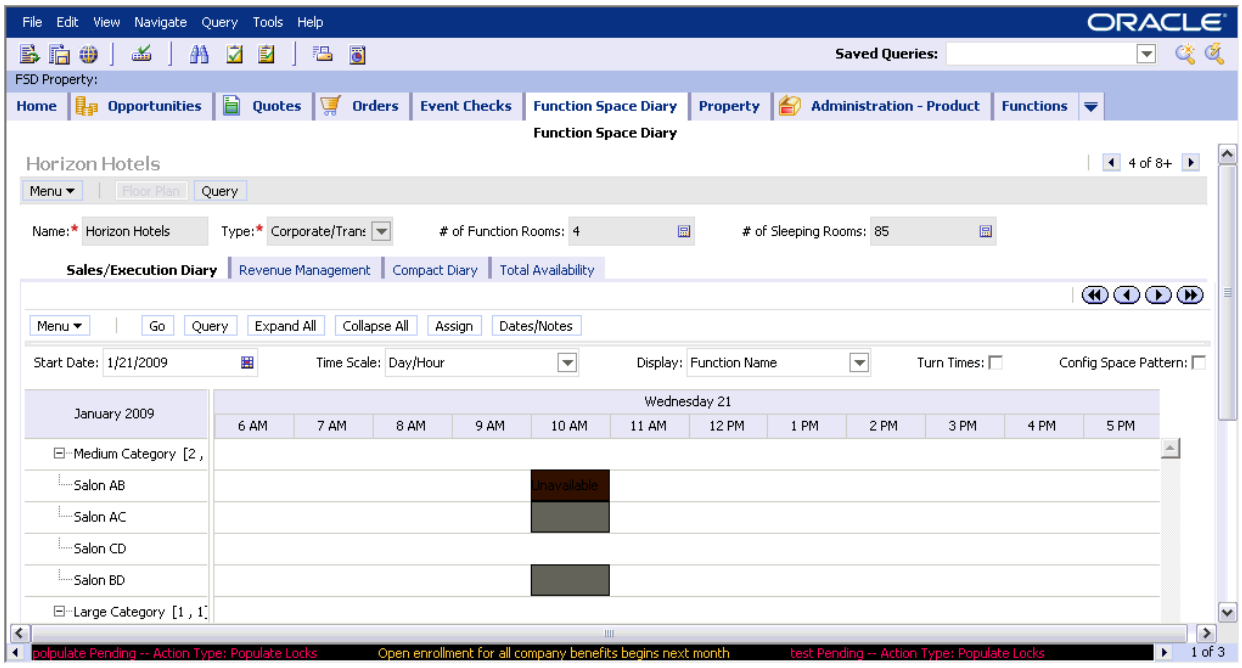


Figure 12. Function Space Diary Screen

Function Space Diary Sales/Execution Diary View

The Function Space Diary's Sales/Execution view is the default view for the diary. Most of the function booking information that sales representatives and event managers require appears in this view.

Function Space Diary Revenue Management View

The Function Space Diary's Revenue Management view is similar to the Sales/Execution view with one exception. The Revenue Management view shows all of the functions that are associated with the selected property.

The Functions information shown in this diary view is similar to the list that appears on the Functions screen. From this view, users can update and copy function records, reserve and launch the best-fit process, and overbook, option, and cancel functions. For more information on performing any of these actions, see Management of Functions at the Quote Stage on page 291.

Function Space Diary Compact Diary View

The Function Space Diary's Compact Diary view, as shown in Figure 13, is used to display function spaces in the more compact form of biggest parent, smallest child on the y-axis.

Unlike the other diary views, the function spaces are not grouped according to category, but instead are grouped according to their parent-child relationships (biggest parent, smallest child on the y-axis). This view can be useful when a property contains large numbers of function spaces.

For example, if a property has a large function space called Salon ABCD, which is formed by connecting Salons A, B, C, and D, each of these salons is displayed under the biggest parent, Salon ABCD, in the Compact Diary view.

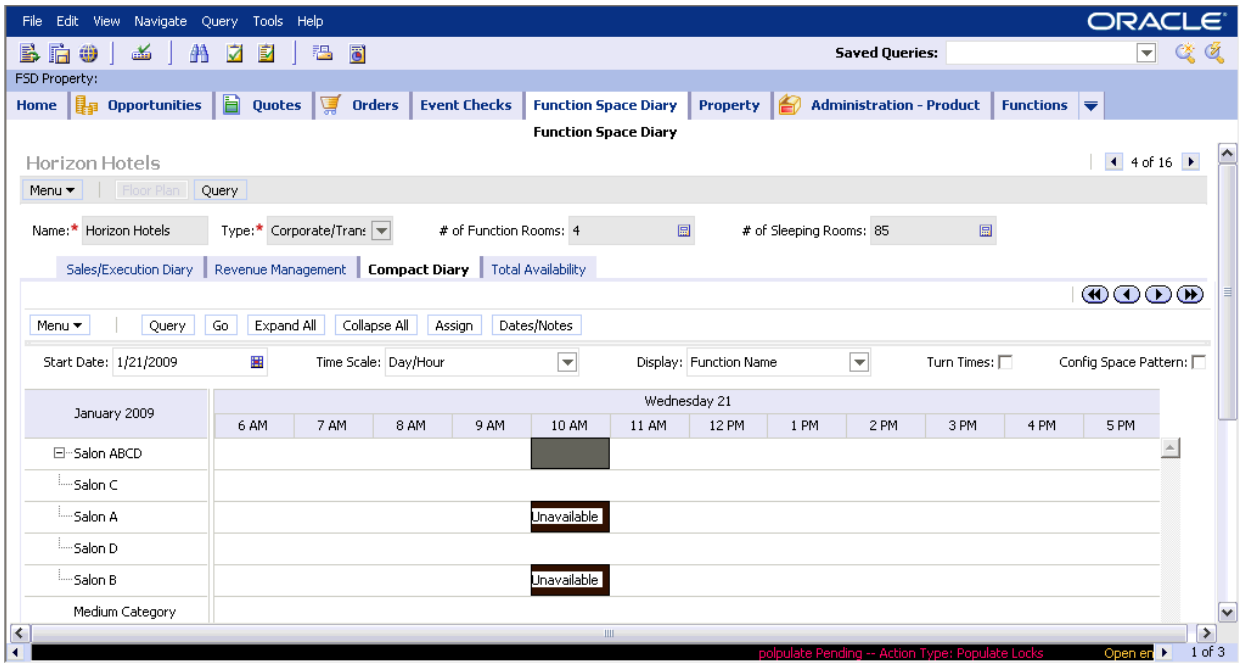


Figure 13. Function Space Diary Compact Diary View

Users can expand or collapse the parent-child relationships by using the Expand All and Collapse All buttons. If the user moves the mouse over the category names on the y-axis, the ToolTip displays a list of the function spaces that are included in the particular category.

All indivisible function spaces are also listed in the Compact Diary view. They appear separately according to parent-child relationships and within the *compact sequence,* which is the order of display.

The function spaces can be displayed in a particular order in the Compact Diary view. This compact sequence is configured using the Property Administration screen's Specific Space and Category views.

As with the other diary views, users can drag and drop bookings onto different function spaces and time periods within the Compact Diary view. However, unlike the other diary views, when users attempt to drag and drop a booking, they must confirm their action by selecting the appropriate function space from the Pick Function Space dialog box that appears.

NOTE: The Pick Function Space dialog box shows only function spaces that are related to the space where users are dragging the function.

Bookings that are made using configured function spaces are displayed as separate indicator bars within the Compact Diary view to show that each of the function spaces is in use at a particular time. For example, a function is booked in Salon ABC. Within the Compact Diary view, an indicator bar appears adjacent to each of these function spaces for the appropriate time period. Salon A, B, and C have the same function name outlined in white against their individual indicator bars.

Function Space Diary Total Availability View

The Function Space Diary's Total Availability view is used to display function bookings in the context of inventory displays. In addition to all the information contained in the Sales/Execution Diary view, this view also shows total sleeping room availability. Sleeping room availability information appears in the Total Group Availability list.

NOTE: Users must make sure that they query for the required date in the Total Group Availability list. This list and the diary information shown above in the Gantt chart are not linked, which means that the information shown can relate to different dates. To match the chart information and the Total Availability list information to the same date, users can click the Refresh button on the diary's Property form.

Users can also review sleeping room availability from the Function Space Diary by clicking the major time axis (Date field). This action takes the user to the Property screen's Total Availability view, which shows property availability records starting from the selected date. Unlike the diary's Total Availability view (which just shows the Total Group Availability), the Property screen's Total Availability view shows total, group, and transient availability.

Function Space Diary View Elements

In Figure 12, the Function Space Diary shows current bookings, overbookings, and dependency bookings represented by bars that extend horizontally along the segments of the selected time period (x-axis). The predefined color and patterns assigned to each bar represent the function's inventory status, setup time, and tear-down time. When space permits, the indicator bar displays booking information. The information displayed on the indicator bar is specified by the option chosen from the Display drop-down list.

Each category and its component specific space is shown on the y-axis. Users can expand or collapse individual categories by clicking the Plus (+) link or the or Minus (-) link. The categories and specific spaces are displayed according to the Display Sequence specified within the Property Administration screen's Category view and Specific Space views, respectively. In addition, values for the category capacity and authorization level are displayed next to each category name. Because authorization levels can vary from day to day, it is important to note that the authorization level shown on the y-axis relates to the date specified in the Start Date field.

When the mouse pointer is positioned on the category or specific space name, the name is highlighted and underlined. If users click the category name link, they are brought to the Property Administration screen's Category view. They can then query for the appropriate category record. If users click the specific space name link, they are brought to the Property Administration screen's Specific Space view and can then query for the appropriate specific space record.

Specific space that is not assigned to a category appears as an individual item. To see the list of available function spaces, scroll vertically.

By scrolling horizontally, users can see the bookings for the same function space across time. This capability is useful if users want to review past dates with actualized bookings to compare availability at a similar season in the past. Click the date on the major time axis to navigate to the Property screen's Total Availability view. For more information on the Total Availability view, see Function Space Diary Total Availability View on page 382. Users can also click on a booking label link and navigate to the Function screen's Line Items view.

NOTE: After users leave the diary and return by clicking Back, the diary's time scale changes back to the default values. For example, the default time scale value is Day/Hour. A sales representative selects the Week/Day time scale option to view information, navigates away from the Function Space Diary view, and then returns by clicking Back. When the diary is displayed again, the information appears in the Day/Hour time scale.

Viewing Function and Booking Details in the Function Space Diary

By moving the mouse over elements in the Function Space Diary, users can view additional information in the ToolTips that appear. Icons and colored indicator bars are also used to indicate different types of bookings and so on. See Icons in the Function Space Diary on page 387 for more information on the icons used in the diary.

Viewing ToolTip Information in the Function Space Diary

Users can view a summary of function details through the ToolTip feature. The information displayed in the ToolTip depends on the option selected from the Display drop-down list. For example, if users select Function Name, the function name appears on the booking indicator bar and not in the ToolTip.

If a special event, holiday, or sell note has been activated and attached to a date in the Function Space Diary, the ToolTip for that date displays description information for the item.

To view a summary of function details

- Position the mouse pointer over the booking in the diary, and in the ToolTip that appears, review details such as:
  - Function name
  - Function type
  - Function status
  - Start time
  - End time
  - Setup style
  - Expected number of attendees

NOTE: If a sales or event manager has been nominated for the function, these details can also be included in the ToolTip.

To review setup and tear-down information

- Position the mouse pointer over the setup or tear-down time, and in the ToolTip that appears, review the start and end date and time periods.
  - If the Turn Times check box is selected, the time periods for each booking's setup and tear-down are displayed according to the pattern predefined by the administrator.

Active and Backup Bookings

If certain function spaces require backup spaces, an icon is displayed next to the appropriate function space names on the y-axis. Icons are also used to indicate other booking attributes, for example, bookings that are on 24-hour hold, affiliate bookings, noisy bookings, and so on. For more information about icon usage in the diary in the Function Space Diary, see Icons in the Function Space Diary on page 387 for more information.

Active and backup bookings are differentiated though the use of a colored border. For example, the administrator may define blue as the active booking color and yellow as the backup booking color. When displayed in the diary, the active booking is shown with a blue border while the backup booking is shown with a yellow border.

Temporarily Assigned Category Spaces and Specific Spaces

Temporarily Assigned category spaces are shown against specific spaces in a color predefined by the administrator.

Dependency Bookings

Dependency bookings are displayed in the diary to indicate bookings that impact other function spaces. For example, if a combined space (A and B and C) is booked, then individual spaces A, B, and C have dependency bars. If, however, AB is booked, then the combined space ABC has dependency bars. The color for the dependency bars is defined by the administrator. Users cannot change the dependency bookings; a ToolTip on the dependency booking shows the function causing the dependency along with the start and end time. In many cases, dependency bookings may be the result of multiple bookings. In this situation, the ToolTip information lists the function space bookings that cause the dependency booking.

Overbookings and Optioned Bookings

When an overbooking or optioned booking occurs, the indicator bar is split vertically. Each booking can be displayed with a separate color if defined by the administrator. The predefined colors and patterns assigned to each bar represent the function's inventory status and setup and tear-down information.

Out of Order and Unavailable Function Spaces

When a function space is set to Out of Order or Unavailable, users can view this information in the Function Space Diary. The color for an Out of Order and Unavailable function space is configured by the administrator. The label shows the booking type (Unavailable or Out of Order) with no setup and tear-down time.

Reserved Beyond Capacity Bookings

Functions that are reserved beyond capacity are differentiated from other bookings through the use of a specific color as defined by the administrator. A function space can be reserved beyond capacity by setting an authorization level which is above the capacity level. For example, the capacity level for Salon A is 2 but the authorization level is set to 3. If the function space is reserved three times, it appears as Reserved Beyond Capacity.

Time-Shifted Bookings

Reserved bookings, which have been shifted to a different time period or date, are indicated by the addition of the word *Shifted* to the function name on the indicator bar. The color of the indicator bar also changes to the defined color for Reserved Shifted. The original booking still appears also in the diary. If the booking cannot be reserved after shifting, it does not appear in the diary.

Function Bookings in Suites

If functions are scheduled to take place in reserved suites, both the suite booking and the function booking are displayed in line with the appropriate suite name. The indicator bar for the particular suite is halved horizontally, and an additional indicator bar appears showing the start and end times for the function in the suite. A separate ToolTip appears for the reserved suite booking and the scheduled function, providing relevant information for each.

Effective Start and End Times

If effective start and end times have been added for any function spaces or categories, these can be viewed in the diary. The ToolTip shows the effective start and end times for the particular function space. The color for an Ineffective function space is configured by the administrator.

Categories and specific spaces are typically removed from the diary view if they are not effective for any of the dates currently displayed. The exception to this is if the dates shown in the diary are within the diary's cached date range. The diary caches information about a certain range of dates beyond what is currently shown and may begin showing a category or specific space up to approximately a month before it becomes effective. When such cached date ranges appear depends on the Time Scale option that users are using to view the information. For an explanation of the Time Scale option, see Using the Information Display Controls in the Function Space Diary on page 389.

Icons in the Function Space Diary

As well as ToolTips, icons are also used in the diary to indicate different types of bookings and function details. The following icons are used in the Function Space Diary.

Table 66. Function Space Diary Icons

Icon	Description	Function
24-hour hold	Black square with a green border, displaying 24 in dark blue.	Indicates that the current function space is on hold for 24 hours. Displayed on the booking indicator bar if space permits.
Backup required	Combination of two symbols, a red triangle containing a gold exclamation mark and a green rectangular shape.	Indicates that current function space requires a backup function space. Displayed next to the function space name on the y-axis.
Noise	Gold and dark blue speaker shape on a black square background.	Indicates that the current booking is going to be noisy and may disturb other guests. Displayed on the booking indicator bar if space permits.
Host booking	Three person shapes, one gold with a green person on either side.	Indicates that the current booking is a host booking. Displayed on the booking indicator if space permits.
Affiliate booking	Three green person shapes.	Indicates that the current booking is an affiliate booking. Displayed on the booking indicator bar if space permits.
Related occurrence bookings	Two black arrows on a white background, forming a circle.	Indicates that the current booking is part of a series of recurring events.
Do not move	A gold and dark blue padlock.	Indicates that the current booking should not be moved from the specified function space. Displayed on the booking indicator bar if space permits

Table 66. Function Space Diary Icons

Icon	Description	Function
Detail	A gold flag.	Indicates that the current booking is a detailed function. Displayed on the booking indicator bar if space permits. **NOTE:** If this icon is displayed next to a function space name on the y-axis, this indicates that it is a specific space, which does not belong to any category.
Suite	Red and green bed on a black background.	Indicates that the current booking is for a suite. Displayed on the booking indicator bar if space permits.
Holiday	A tropical tree.	Indicates that the date is a holiday. This icon appears in all Function Space Diary views except the Month/Day view, where holidays are indicated only by the changed cell color specified in the Function Space Diary Administration screen.
Special Event	A yellow bell.	Indicates that the date is a special event. This icon appears in all Function Space Diary views except the Month/Day view, where special events are indicated only by small red triangle in the upper right corner of the cell.
Sell Note	A dollar sign on a note pad.	Indicates that the a sell note is associated with the date. This icon appears in all Function Space Diary views except the Month/Day view, where sell notes are indicated only by bold text.
Red Triangle	A red triangle.	Indicates that an event occurs on the date, but space limitations prevent a larger icon from being displayed. This icon marks special events in the Month/Day view.

NOTE: Function Space Diary icons are not customizable.

Color Coding in the Function Space Diary

Color coding indicators differentiate between weekdays, weekends, and holidays in the Function Space Diary. If a holiday occurs on a weekend, the weekend color takes priority. The same color coding also applies to the Availability views.

NOTE: Holidays are also marked by an icon in all views except the Month/Day view, where they are marked only by color. The Holiday icon is shown in Table 66.

Users can customize the colors for holidays and weekends in the Function Space Administration > Function Space Diary Administration > Function Color Schema view.

Using the Information Display Controls in the Function Space Diary

Users can change the way that information appears in the Function Space Diary using various controls.

Start Date

The date displayed in the Start Date field is the date to which the information currently displayed in the diary relates. Users can enter new dates in the Start Date field to change the day for which information is displayed in the diary.

To change the date displayed in the Function Space Diary

1. Click the calendar select button to choose the start day for the diary.
2. Click Go when you have selected a date.

   The Function Space Diary refreshes to display the specified date.

Time Scale

The Time Scale option allows users to change the time intervals displayed in the diary views. Users can display the selected date in quarter-hour intervals, hour intervals, and so on.

To select the Time Scale option in the Function Space Diary

- Select the appropriate option from the Time Scale drop-down list, and then click Go to change the time scale shown in the diary views.

  The time scale options are:

  - **Day/Day-Part.** This option displays the diary views with the time axis for each day divided into the various day parts such as morning, lunch, afternoon, and evening. Administrators set up the day parts using the Property Administration screen > Day Parts list. See Setting Up Property Day Parts on page 128 for more information.

- **Day / Hour.** This option displays the diary views with the time axis for each day divided into hourly intervals.
- **Day / Half-Hour.** This option displays the diary views with the time axis for each day divided into half-hour intervals.
- **Day / Quarter-Hour.** This option displays the diary views with the time axis for each day divided into quarter-hour intervals.
- **Month / Day.** This option displays the diary views with the time axis divided into 31 days.
- **Month / Day-of-Week.** This option displays the diary views with the time axis divided into four, with each division showing the same day for four consecutive weeks. For example, if the date selected as the Start Date value is a Monday, the time axis shows four consecutive Mondays, starting with the specified date.
- **Month / Day-of-Week / Day Part.** This option displays the diary views with the time axis showing the same day for four consecutive weeks, and each day divided into the various day parts such as morning, lunch, afternoon, and evening.
- **Week / Day.** This option displays the diary views with the time axis divided into seven separate days of the week, starting with the day on which the specified start date falls.
- **Week / Day / Day Part.** This option displays the diary views with the time axis divided into separate days of the week, starting with the day on which the specified start date falls. Each day shows the various day parts such as morning, lunch, afternoon, and evening.

Display

This option allows users to change the information included in the function summary ToolTips. For example, an event operations associate might be interested in the setup styles, while a chef might be more interested in the meal periods. A revenue manager might want to view the function types.

To change the information displayed in the function summary ToolTips

- Select an option from the Display drop-down list, and then click Go to show different information as labels on the booking indicator bars.

  Display options include:

  - Functions Name
  - Function Type
  - Business Type
  - Meal Period
  - Quote Name
  - Setup Style
  - Event Manager
  - Sales Manager
  - Function Type/Business Type

- Event Manager/Sales Manager
- Quote Name/Function Name
- Function Status/Meal Period

When users change the display option, all of the bookings show the label that they selected. For example, if a user selects setup style, then all the bookings appear with the setup style information. The previous display label becomes part of the information included in the ToolTip.

NOTE: You can change the abbreviated text displayed in the function summary ToolTips by editing the attributes in the Property Administration > Abbreviations screen. For example, adding a display option called Function Type/Number of Attendees might use the following abbreviation for a wedding with 200 attendees, set up with round tables: WED/200/RNDS.

Turn Times Flag

When the Turn Times flag is selected, the setup and tear-down times are displayed using the pattern set up by the administrator.

- Select the Turn Times check box, and then click Go to display setup and tear-down times.

  If this check box is cleared, then all bookings are shown without turn time indicators in the diary. However, warnings of turn time conflicts are still displayed.

Config Space Pattern Flag

When the Config Space Pattern flag is selected, booked spaces that are configured spaces are distinguished by a diagonal pattern.

NOTE: It is recommended to use different patterns for the Config Space Pattern flag and the Turn Times flag, because both items can be checked at the same time.

Expand All and Collapse All Buttons

Use the Expand All and Collapse All buttons to show and hide data in the Function Space Diary.

- **Expand All.** Users can view the entire hierarchy of categories and each category's specific space.
- **Collapse All.** Users can view overflow bookings, like category bookings that could not be temporarily assigned or options on categories and overbookings on categories, and then reassign the bookings. The overflow bookings can then be positioned against an unassigned category or specific space.

Assign Button

Click this button to assign category bookings to specific space bookings.

See Assigning Category Bookings on page 397 for more information.

Dates/Notes Button

Users can view notes for the day to understand availability in the context of any special comments or special dates.

Click this button to view all notes for the day.

NOTE: The dates/notes that are displayed in the dialog box when a user clicks this button are restricted to only those dates/notes that correspond to days that the user sees in the diary.

Paging Buttons

There are four paging buttons that users can use to navigate within the Function Space Diary views: Previous column set, Previous column, Next column, and Next column set. These buttons are located in the upper-right corner of each diary view.

Using the paging buttons, users can navigate through the Function Space Diary to reach any required date and time period, moving one week back or one week forward.

The following procedure describes how to navigate within a time range, using the paging buttons.

To move forward and backward within the Function Space Diary time range

1. Navigate to the Function Space Diary screen.
2. Select a property and date for which you have a record.

   Choose an appropriate time scale from the Time Scale drop-down list (for example, Week/Day) and then click the Go button.
3. The Function Space Diary displays your selected date as the first date in the view.
4. You can now move backward and forward in the diary using the paging buttons.

   The paging buttons are:

   - **Next column.** Use this button to move forward one day at a time.
   - **Previous column.** Use this button to move backward one day at a time.
   - **Next column set.** Use this button to move forward one week at a time. For example, if the chosen date was Sunday October 10, 2004, when you click the Next column set button, the diary moves forward one week to display Sunday October 17, 2004.
   - **Previous column set.** To move backward one week, click the Previous column set button.

Navigation for Month/Day-of-Week Option

When the Month/Day-of-Week option is selected from the Time Scale drop-down list, the information in the diary view changes to display instances of that particular weekday. This change in the diary view alters slightly alters the behavior of the Paging buttons.

For example, if a user selects October 18, 2009, four instances of Sunday are displayed in the diary view, October 18, October 25, November 1, and November 8.

- When the user clicks the Next column button, the view changes to display four instances of Monday, starting with October 19.
- When the user clicks the Previous column button, the four instances of Sunday appear again.
- When the user clicks the Next column set, the diary advances one week to display the next appropriate weekday. The diary displays October 25, November 1, November 8, and November 15.
- When the user clicks the Previous column set button, the diary moves backward one week to again display the previous four instances of Sunday, starting with October 18.

Storing User Preferences for the Function Space Diary

Users can store preferences for the following information display controls in the Function Space Diary: Time Scale, Display, Turn Times, and Config Space Pattern. Settings are stored in the User Preferences > Function Space Diary view.

Using Drag and Drop Operations in the Function Space Diary

Users can perform drag and drop operations in any view of the Function Space Diary. The following examples illustrate typical drag and drop operations.

NOTE: Users cannot drag a booking to a position that has no y-axis bar.

Dragging a Booking to a Different Time, Different Function Space

Users can drag the booking to a different time, drag the booking within the same time period to a different function space, or drag the booking to a new function space at a different time. While moving the booking, they can drag and scroll at the same time.

NOTE: When users attempt to drag a booking to a new function space or time period in the Compact Diary view, they must confirm the action by selecting the appropriate function space from the Pick Function Space dialog box that appears.

Specific Space Booking Conversion to Category Booking

If users want to convert a specific space booking into a category booking, they can drag the specific space booking and position it on the category bar. If possible, the booking is temporarily assigned and shown against the specific space. If the booking is not assigned, it still appears under the category bar.

Category Booking Conversion to Specific Space

Temporarily Assigned category bookings can be converted to specific space by dragging and dropping the category bookings to the specific space. Category Overflow bookings dragged to a specific space are automatically converted to a specific space.

Optioning and Overbooking on a Specific Space

If a specific space booking is dragged to another booking (a specific space or a dependency), a dialog box appears notifying users that the selected function space time conflicts with an existing booking. They can choose to change the booking to an option, overbook, or cancel the change by clicking the appropriate buttons (Overbook, Option, Cancel) in the dialog box. Users can also click OK to acknowledge that the booking was unsuccessful and allow it to remain unreserved.

Optioning and Overbooking on a Category

Users can drag a booking and drop it onto the category bar. If possible, the booking is automatically reserved and assigned. If the booking cannot be reserved, a dialog box appears notifying them that a conflict exists. Users can choose to change the booking to an option, overbook, or cancel the change by clicking the appropriate buttons (Overbook, Option, Cancel) in the dialog box. They can also click OK to acknowledge that the booking was unsuccessful and allow it to be unreserved.

Moving Suite Functions

If a function is scheduled to take place in a reserved suite, the function cannot be moved to a different function space. However, users can move the function to a different period within the suite's time range. Drag the ends of the function indicator bar to change the start and end times.

Moving Bookings with Associated Backup Spaces to a New Time

When moving active bookings to a new time period, the backup space must also be able to move to the new time for the booking to be successful.

If the active space can be moved but the backup space is unavailable for the new time period, a dialog box appears, allowing users to option, overbook, cancel, or unreserve the booking.

If the active booking cannot move to the new time period due to conflicts, a dialog box appears, allowing users to option, overbook, cancel, or unreserve the booking. If a user clicks OK, both the active and the backup bookings are unreserved.

If users can successfully option or overbook the function space time for the active booking, the backup space is also moved to the new time.

If conflicts arise when the system tries to move the backup booking, users can try overbooking or optioning the backup space time using the dialog box that appears. However, if this is unsuccessful, the backup booking must be unreserved or the change cancelled.

For more information on resolving conflicts, see Backup Booking Conflict on page 396.

Moving Bookings with Associated Backup Spaces to a New Space

When moving active bookings to a new function space, the system verifies whether the new function space also requires a backup space.

If the new space does not require a backup space, and the function space is available for the active booking, a dialog box appears, prompting users to choose whether or not to keep the backup space booking. Depending on their selection, the backup space booking is marked as unreserved or kept.

If the new space does not require a backup and the function space is unavailable for the active booking, users can try overbooking or optioning the function space using the dialog box that appears. If the function space can be optioned or overbooked, they are asked to choose whether or not to keep the associated backup space booking. If it is not possible to option or overbook the function space, the active booking must be unreserved or the change canceled.

If the new space does require a backup space, and the function space is available for the active booking, a dialog box appears, prompting users to choose whether or not to keep the backup space booking. Depending on their selection, the backup space booking is reserved or unreserved.

If the new space does require a backup and the function space is unavailable for the active booking, users can try overbooking or optioning the function space using the dialog box that appears. If the function space can be optioned or overbooked, they are prompted to choose whether or not to keep the associated backup space booking. If it is not possible to option or overbook the function space, the active booking must be designated as unreserved or the change canceled.

For more information on moving bookings to new spaces, see Backup Booking Conflict on page 396.

Swapping Specific Space Bookings

If a user wants to swap specific space bookings, for example swapping spaces A and B, that user can drag space A onto space B. Space B becomes either optioned or overbooked. The user can then drag space B to the place on the Gantt chart previously occupied by space A.

Extending Bookings

Users can extend a booking by dragging either end of the booking's indicator bar. Drag the right side of the indicator bar to extend the booking into a later time period and drag the left side of the indicator bar to extend the booking into an earlier time period. They can use the ToolTip to check the precise time period to which they have extended the booking.

Setup Style Conflict

If users drag a booking onto a specific space that does not accommodate the booking's setup style, the following message appears:

```
Invalid combination of function space and setup style.
```

Turn Time Conflict

If users drag a booking with a turn time that overlaps with the turn time of another booking, the following message appears:

```
This booking has created a turntime conflict.
```

Ineffective Function Space Conflict

If users drag a booking to an ineffective specific space or category, the following message appears:

```
The function space is unavailable during this time frame.
```

Backup Booking Conflict

If users drag an active booking that has an associated backup booking to another function space, the following message appears:

```
The function space you are trying to move has related function spaces.
```

If users attempt to drag a backup booking to a different time period, the following message appears:

```
Moving of a non-primary function space booking to a new time is not permitted. Please
move the primary function space booking instead.
```

NOTE: It is possible, however, to drag a backup booking to a different function space.

When they attempt to drag an existing active booking to a time period already occupied by another booking, the following message appears:

```
The function space booking was unsuccessful. Please choose from one of the following
options: OK, Option, Overbook, or Cancel.

If the function space booking cannot be optioned or overbooked, it will become
unreserved. Non primary spaces for the function (if any) will be unreserved as well.
```

NOTE: When users successfully drag an active booking to an available time period, the backup booking moves with it.

Viewing Floor Plans in the Function Space Diary

This topic discusses the methods for viewing floor plans in the Function Space Diary.

Viewing Floor Plans

In the Function Space Diary's Property form, users can click the Floor Plan button to view an image of the selected property's function spaces. The graphics file image is added as an attachment to the property record. The image can also be viewed on the Property screen by selecting the Floor Plans view tab. Users can choose whether to open the file from the current location or to save a copy on their own computer.

Viewing Thumbnail Floor Plans

Users can select Thumbnail Floor Plan as a menu option from the Property form's Menu drop-down list to view a thumbnail image of the floor plan. They can choose whether to open the file from the current location or to save a copy on their computer.

Viewing the Floor Plan Web Site

Users can view floor plans that have been uploaded to a Web site by selecting the Floor Plan Website option from the diary's Property form menu. When the user selects this option, a Web site appears that shows property floor plans.

The Floor Plan Website option must be configured by the administrator using Siebel Tools before it is available for use, as described in Configuring the Floor Plan Website Option on page 48.

Changing Bookings in the Function Space Diary

Bookings can be changed directly from the Function Space Diary in any of the following ways:

- Category bookings can be assigned to specific space bookings.
- Out of Order and Unavailable function space designations can be deleted.
- Bookings can be changed to reserved, unreserved, optioned, and so on.

NOTE: Administrators can customize the application to allow users to block function spaces directly from within the Function Space Diary. For this purpose, the following parameters are available in the eHospitalityObjMgr_enu.log file: Function Space Name, Property Name, and Date and Times.

Assigning Category Bookings

If the revenue manager is satisfied with the specific space assignments that are displayed in the Function Space Diary, the manager can convert all category bookings for the day into specific space bookings using the Assign button. The function space inventory engine automatically accounts for new bookings as well as existing bookings and assigns the category bookings to the specific spaces.

By default, time and space optimization is enabled for assigning bookings to specific spaces. However, if there are high numbers of function spaces available for the current property, time and space optimization can slow the assigning process significantly, and assignment may take several minutes to complete. It may be more practical to disable time and space optimization in such circumstances.

NOTE: Users can only choose to disable or enable time and space optimization when the time scale selected is Month/Day-of-Week or Week/Day. When the other time scales are selected, time and space optimization is enabled by default and the Menu button options are not available.

To assign category bookings with space and time optimization disabled

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab (Sales/Execution, Revenue Management, Compact Diary, or Total Availability).
4. In the selected view, enter the required start date and time scale (Month/Day-of-Week or Week/Day), and then click Go.
5. Click the view's toolbar, then click the menu button, and select Disable Space/Time Optimization.
6. Click the Assign button to assign the category bookings to specific spaces.

To assign category bookings with space and time optimization enabled

1. Follow the steps in the previous procedure to view the required information in the diary view.
2. On the view's toolbar, click the Menu button and select Enable Space/Time Optimization.
3. Click Assign to assign the category bookings to specific spaces.

Deleting Out of Order and Unavailable Designations

Users can delete out-of-order and unavailable function space designations, using the following procedures.

To delete an Out of Order designation on a function space

1. Right-click on the function space designated as Out of Order.
2. Choose Delete.

   The display refreshes and the function space is no longer labeled as Out of Order.

   NOTE: When users delete an Out of Order designation from the diary, this information is also removed from the property pricing records.

To delete an Unavailable designation on a function space

1. Right-click on a function space designated as Unavailable.
2. Choose Delete for either the particular occurrence or for the entire series.

   When you have chosen the appropriate option, the display refreshes and the occurrence or series is removed from the diary.

   NOTE: When you delete an entire series from the diary, this information is also removed from the property pricing records.

Changing Booking Inventory Statuses

Booking inventory records can be updated directly from within the Function Space Diary views.

Reserved Bookings

Right-click on a reserved booking to unreserve it. When users unreserve a booking, the booking is removed from the diary views and the inventory status is changed to Unreserved.

Users can also assign the booking to a category or to a specific space, depending on how the booking has already been assigned. If they choose Assign to Category, the booking changes color to indicate that the booking is no longer assigned to a specific function space. To reassign the booking to a specific space, right-click on the category booking and choose Assign to Specific Space.

Optioned and Overbooked Bookings

Users can change optioned and overbooked bookings using the following procedures.

To change optioned or overbooked bookings

- Right-click on an optioned booking to unreserve or overbook it.

  When you overbook an optioned booking, the booking changes color to indicate that the booking is now overbooked.

- To change the booking again, right-click on the overbooked booking, and choose Optioned from the menu.

  If you unreserve an optioned or an overbooked booking, the indicator bar split is removed, and the booking is displayed as Reserved.

  NOTE: When optioned and overbooked bookings are created, the indicator bar is split vertically to display different bookings for the same function space and time period. Make sure that you right-click on the correct booking and not any other bookings that may be part of the same indicator bar.

- To unreserve a booking, right-click on a reserved booking on the same indicator bar as an optioned booking and choose Unreserve.

  The split is removed from the indicator bar, and it changes color to indicate that the inventory status has changed to Option Reserved.

- To reserve an unreserved booking, right-click on a reserved booking on the same indicator bar as an overbooked booking and choose Unreserve.

  The split is removed from the indicator bar, and it changes color to indicate that the inventory status has changed to Reserved.

To accept or reject an option on a reserved booking

- Right-click on option reserved booking to accept the option or unreserve it.
  - If you choose to accept a booking, the booking inventory status changes to Reserved.
  - If you unreserve an option reserved booking, the booking is removed from the diary views and the inventory status is changed to Unreserved.

Querying the Function Space Diary

Through the Function Space query assistant, users can create queries that are based on booking as well as function space attributes. The query assistant is available from each diary view. The query assistant is divided into two sections, Functions/Bookings and Function Spaces.

When the user enters criteria in any of the sections, that user can then decide to use the Boolean operators, AND or OR. If that user uses AND, the bookings or function spaces returned must meet all their specified criteria. If that user uses OR, bookings or function spaces with any of the criteria are returned in the diary.

Users can enter parameters into either or both of the sections. If they enter query parameters into both sections, the results returned must meet the criteria set in both.

When users execute their queries, the diary changes to display only the appropriate information, as determined by their query criteria. Dependency bookings are also indicated within the diary when possible.

For more information on using the query assistant, see *Fundamentals*.

Querying for Bookings and Functions

Users can create queries that filter bookings on the basis of the following criteria:

- General booking attributes (noise, detailing, and so on)
- Booking status (overbooked, optioned, shifted, and so on)
- Booking relationship type (affiliate, host, and so on)
- Booking activity (backup or active)
- Specific space or a category booking
- Quote-related attributes (business type, account, sales representative, and so on)
- Operational attributes (set up style, function type, meal period, and so on)

Querying for Function Spaces

In addition to querying for specific bookings, users can also query for function spaces that meet certain criteria. For example, they can choose to display only function spaces that have Internet connections or have a specific capacity.

Querying for Related Function Spaces

Users can execute queries, which display not only the particular function space that meet their criteria but also include any related function spaces. For example, if a user executes a query that returns Salon A, it can be helpful to know that this salon is also used to form Salon AB, Salon AC, and Salon ABC. It is also useful to know whether or not bookings have been made for these function spaces on a particular date.

To query for related function spaces

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab (Sales/Execution, Revenue Management, Total Availability, or Compact Diary).

4 From the selected view, enter the required start date, and then click Go.

Alternatively, you can specify the start date within the query assistant.

5 On the view's toolbar, click Query to display the query assistant.

6 Enter your criteria in the Function Spaces section, and then click Go.

The function space most suitable for your needs appears.

7 On the view's toolbar, click the menu button, and select Enable Query for Related Spaces.

The diary changes to display any function spaces that are related to the returned function space.

To disable queries for related spaces

- From the diary view, click the Menu button and select Disable Query for Related Spaces. If you have already executed a query, the diary changes to display only the original function space returned, hiding the related spaces from the view.

Querying for a Combination of Bookings and Function Spaces

Users can use the query assistant to display certain types of bookings for a specific subset of function spaces. For example, a user can enter parameters in the booking section so that only backup bookings appear. That user can then enter parameters in the function space section so that only function spaces with a physical area greater than 20 square meters are displayed.

When users execute the query, the Function Space Diary changes to show only backup bookings for function spaces that are greater in size than the specified value.

Clearing Query Parameters from the Diary Views

When a query has been performed in the diary, the bookings and function spaces are filtered to show only those that meet the user's query criteria. This means that the diary shows only a subset of all available information. If a user wants to display all possible bookings and function spaces appropriate to the selected date and property, that user can remove the query filtering from the views.

To clear the query parameters from the diary views

1 Click the Query button on the diary view's toolbar.

2 In the Query Assistant dialog box, click the Clear button.

All the query fields are cleared.

3 Click Go to perform a blank query.

The diary views now show unfiltered information.

Navigating to the Function Space Diary

Users can navigate to the Function Space Diary from a number of different screens and views in the Hospitality application. These include:

- Functions screen > Functions List view
- Quotes screen > Functions view
- Property screen > Total Availability view
- Property screen > Total Group Availability view
- Property screen > SR Type Availability view
- Property Pricing Admin screen > Out of Order view
- Property Pricing Admin screen > Unavailable view
- Function Space Diary screen

This task is a step in Process of Using the Function Space Diary on page 378.

To navigate to the diary from the Functions screen

1. Navigate to the Functions screen > Functions List view.
2. In the Functions list, query for the function.
3. In the Function record, click the link in the Date field.

   The diary displays the property record associated with the function and the selected date.

To navigate to the diary from the Quotes screen

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Function list, select the function, and then click the link in the Date field.

   The diary shows the property record and the selected date.

To navigate to the diary using the Property screen Total Availability view

1. Navigate to the Property screen.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the property Name field.
4. Click the Total Availability view tab.

5 Click Go to Diary in either the Total Group Availability or the Total Transient Availability list.

The diary shows the property record and the current date.

NOTE: Users can also navigate to the diary from the Property screen's Total Group Availability and SR Type Availability views by clicking Go to Diary.

To navigate to the diary using the Property Pricing Admin screen Out of Order view

1 Navigate to the Property Pricing Admin screen.

2 In the Properties list, query for the property record.

3 In the Property record, click the link in the Property Name field.

4 Click the Out of Order view tab.

5 From the Out of Order list, select the record, and then click the link in the Start Date Time field.

The diary shows the property record and the selected date.

To navigate to the diary using the Property Pricing Admin screen Unavailable view

1 Navigate to the Property Pricing Admin screen.

2 In the Properties list, query for the property record.

3 In the Property record, click the link in the Property Name field.

4 Click the Unavailable view tab.

5 In the Unavailable list, select the record, and then click the link in the Recurr Start Date field.

The diary shows the property record and the selected date.

To navigate to the diary using the Function Space Diary screen

1 Navigate to the Function Space Diary screen.

2 In the Properties form, query for the property record.

3 Click the appropriate view tab.

Navigating from the Function Space Diary

Administrators can use Siebel Tools to configure the Function Space Diary so that users can click a blocked function in the Function Space Diary and navigate to the corresponding quote or function view.

When configuring navigation in Tools, use the following values:

For the Quote View Drilldown:

- User Property: Item Drilldown Src Field Substitutes

- Value: Item Drilldown;Quote Id
- Drill Down Object: Item DrillDown
- View Name: TNT SHM Quote Function Line Items View
- BC Name: Quote

For the Function View Drilldown:

- User Property: Item Drilldown Src Field Substitutes
- Value: Item Drilldown; Function Id
- Drill Down Object: Item DrillDown
- View Name: TNT SHM Function Line Item More Info View
- BC Name: TNT SHM Function

For more information on configuring navigation in Siebel Tools, see *Using Siebel Tools*.

Printing from the Function Space Diary

Users can print each of the different Gantt charts displayed in the Function Space Diary. Complete the following procedure to print the information currently displayed in a diary view.

To print a Function Space Diary view

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab (Sales/Execution, Revenue Management, Total Availability, or Compact Diary).
4. In the selected view, enter the required start date and time scale, and then click Go.
5. Scroll to view the bookings or functions you want to print.
6. On the view's toolbar, click the menu button, and select Print.

   Selecting Print launches Microsoft Word, and the Gantt chart is copied as an image to the new document. This image displays what can currently be seen within the Function Space Diary.
7. Print the Gantt chart using Word's Print feature.

23 Working with Quote and Order Pricing

This chapter provides conceptual topics and examples that explain typical quote and order pricing processes. It includes the following topics:

- About Quote and Order Pricing on page 406
- Function Space Pricing on page 406
- Sleeping Room Pricing on page 411
- Suite Pricing on page 416

About Quote and Order Pricing

Property pricing administrators are responsible for setting prices at each property for products and services that are sold to large groups requiring sleeping rooms, function space and catering products. Prices quoted to customers vary by property, product type, customer, date, day of week, day part, and other factors. A sales representative can apply these prices to sleeping rooms, function space, and other ancillary products (for example food, beverages, and audiovisual services) that are sold during an event. Siebel Hospitality employs a rules-based pricing system that applies prices to a quote based on pricing data that exists in the system. After system-based recommendations appear in the quote, further negotiations with the customer result in a finalized quote (with price overrides). This finalized quote is then converted into an order.

Pricing management involves three primary pricing processes:

1. Pricing data management and pricing administration. For more information, see Chapter 11, "Setting Up Pricing and Property Pricing."
2. Quote and Order Pricing. This chapter cover the basics of quote and order pricing.
3. Revenue management and profitability analysis. For more information, see Chapter 24, "Revenue Management."

Function Space Pricing

Function space pricing is determined by the rental price for the function space and also the profit and revenue thresholds for the function space. These pricing factors are defined by the pricing administrator. This section describes how function space prices are calculated, and contains the following topics:

- Function Space Room Rentals
- Profit and Revenue Thresholds

Function Space Room Rentals

Function space room rentals are defined for the days of the week, which may change season to season, as well as by parts of the day. When an administrator sets up function space room rates for a hospitality property, the administrator establishes default rentals for each day of the week as well as the exceptions for different seasons. For more information, see Defining Function Space Pricing Rules on page 153.

End users can use function space room rentals as benchmark rental prices for the quote or order, before pricing adjustments are made.

Profit and Revenue Thresholds

Thresholds are predetermined amounts that indicate how much profit needs to be made by the hospitality property to complete the booking. Some hospitality companies only accept function space business if a predetermined profit threshold amount is met for a property event. This mechanism is used to qualify event opportunities at a property based on the event's revenue and profit potential.

The Revenue Manager can override the threshold and approve a quote even if it does not meet the threshold or has a negative threshold profit variance.

Thresholds are defined by revenue managers for function space by days and day parts. For more information, see Function Space Pricing Administration on page 153.

When thresholds are calculated, the following rules are applied:

- Any time a function touches a day part, even for a few minutes, the function space category threshold value for the day part is applicable.
- The functions for threshold calculation are considered along with established turntimes.

Example of a Threshold Calculation with Applied Rules

This example explains the threshold calculation that occurs when three functions take place in the same function space called FSC 1. Table 67 shows the functions and time intervals.

Table 67. Threshold Calculation for Functions in Same Function Space

Function Name	Function Type	Start Time	End Time	Function Space
Function 1	Meeting	5:00 A.M.	11:59 A.M.	FSC 1
Function 2	Lunch	12:10 P.M.	1:00 P.M.	FSC 1
Function 3	Reception	3:00 P.M.	11:00 P.M.	FSC 1

To calculate the required threshold for each function, the system determines the number of day parts the function covers. The day part is included even if the function only uses a few minutes of the day part.

The system then determines the threshold associated with each of the day parts listed for the function. Table 68 shows how day parts are set up for the property.

Table 68. Example Setup of Day Parts for a Property

Day Part Name	Start Time of Day Part	End Time of Day Part
Overnight	12:00 A.M.	6:00 A.M.
Morning	6:00 A.M.	9:00 A.M.
Afternoon	9:00 A.M.	12:00 P.M.
Lunch	12:00 P.M.	2:00 P.M.

Table 68. Example Setup of Day Parts for a Property

Day Part Name	Start Time of Day Part	End Time of Day Part
Evening	2:00 P.M.	6:00 P.M.
Night	6:00 P.M.	12:00 P.M.

Table 69 shows the thresholds that are in effect. The assumption is that function space category (FSC) 1 and 2 have the same threshold amount.

Table 69. Thresholds in Effect for Day Parts

Day Part	Function Space	Threshold
Overnight	FSC 1, FSC 2	100
Morning	FSC 1, FSC 2	200
Afternoon	FSC 1, FSC 2	500
Lunch	FSC 1, FSC 2	300
Evening	FSC 1, FSC 2	800
Night	FSC 1, FSC 2	800

Table 70 shows how the required threshold calculation occurs, assuming the turntimes are zero.

Table 70. Threshold Calculation for Day Parts and Function Spaces

Function Space	Function	Day Part Touched	Threshold for Function Day Part	Threshold Sum for Function
FSC 1	F1	Overnight, Morning, Afternoon	100 + 200 + 500	800
FSC 1	F2	Lunch	300	300
FSC 1	F3	Evening, Night	800 + 800	1600
Required Threshold				2700

As can be seem from Table 70, the thresholds are calculated as follows:

- `Threshold Sum for Function = Sum of the Thresholds for Function Day Parts`
- `Required Threshold = Sum of the Threshold Sum for Function`

The following exceptions may be applied when the required threshold is calculated:

- If two functions (from the same quote) exist within the same day part for the same function space, then the day part is only counted once.

- If a customer requests that two functions be booked within the same day part for different specific spaces, then the threshold is counted for each separate room.
- If two functions belong to different categories, and both categories share the same component indivisible space as well as a day part, then only the threshold of the larger category is counted.

Function Line Item and Revenue Data Repricing

The user can recalculate the pricing for functions, roll up line item changes, and revise revenue data using the Reprice All and Refresh buttons. The Reprice, Reprice All, and Refresh buttons appear on the following views:

Reprice

- Quotes Functions view
- Orders Functions Line Items view
- Functions screen's Function List view

Reprice All

- Order Functions Line Items view
- Quotes Functions view
- Functions screen's Function list view

Refresh

- Quote Functions view
- Quote Summary view

Reprice Button

The Reprice button is used to recalculate the price of individual functions or line items when new functions or line items are added or function space is changed. Multiple functions or line items can be selected and repriced at the same time. If Reprice is launched from the Functions list applet in the Orders Functions view or Quotes Functions view, then all the line items in the selected function are repriced and then selected functions are refreshed.

If Reprice is launched from the Function Line Items list applet, the system retrieves the current price for the selected line item.

NOTE: Users cannot use this button when dealing with nonparticipating properties (NPPs).

Reprice All Button

The Reprice All button is used to recalculate the price of all the functions in the function list. Reprice All is typically used when pricing is required for items that were previously flagged for pricing bypasses or if a new pricing scenario is being explored at the sales prospect stage. If the end user launches Reprice All from the Orders Functions view or the Quotes Functions view, all of the line items are repriced at the same time.

When the user clicks Reprice All at the function level, the following actions occur:

- The room rental amounts are aggregated for all functions, because room rental charges change depending on the day of the week.
- The required threshold is calculated.
- All catering products for the quote are repriced.
- Catering revenue and profit is calculated.
- The Profit threshold variance is calculated.
- Revenue threshold variance is calculated again.

When the user clicks Reprice All at the function line item level, the system retrieves the current prices for all the line items in the current function.

NOTE: Users cannot use this button when dealing with nonparticipating properties (NPPs).

Refresh Button

The Refresh button is used to roll up line item changes and recalculate revenue data that appears in the quote's Function Revenue Estimates view after changes are made to the line items. If there are no line item changes, no action occurs when the button is clicked.

When a change is made to a line item, the Need Refresh flag appears to remind users that the Refresh button must be clicked for revenue recalculation. Clicking Refresh in the quote's Functions view rolls up revenues from the line items to the function, and then to the quote. If the Line Item Sum flag is selected, then the sum of the line items is rolled up to the quote level; otherwise, the projected revenue values are rolled up to the quote level.

Clicking Refresh from the Quote Summary view rolls up revenue from sleeping rooms and functions to the quote level.

When an end user clicks Refresh at the function level, the following actions occur:

- Catering revenue and profit is updated to reflect the updated revenue and profit of the selected functions.
- The Profit Threshold Variance is calculated.
- The Profit Variance is updated.
- The Required Threshold is recalculated.
- The Revenue Threshold Variance is recalculated.
- The average values are retrieved and aggregated in the Function Revenue Estimates.

- Quote Revenue Estimates are retrieved either from the average values or line items depending on the value in the Line Item Sum field.
  - If the flag in the Line Item Sum field is selected, then the revenue estimates are retrieved from the function's line items.
  - If the flag in the Line Item Sum field is not selected, then the revenue estimates are retrieved from the functions's average values.
- The opportunity revenue is updated with the projected quote revenue.

Sleeping Room Pricing

Although a benchmark room rate is applied to sleeping rooms, the pricing can vary depending on the following factors:

- Room type
- Day of week (for example, on Sunday, increase by 5%; on Monday, increase by 15%)
- Seasonality (date ranges)
- Special Dates (overrides)

The benchmark rate for each room type is defined as an item in the property's pricing matrix. There are seven benchmark prices for each room type—an individual benchmark price for each day of the week. Additional pricing adjustments to benchmark prices are made using matrix-based pricing factors that detail pricing adjustments such as price overrides, price markup, discount amount, discount %, and % mark up. For more information about matrix pricing, see Setting Up a Matrix Series on page 170.

This section contains the following topics:

- Pricing and Room Occupancy on page 411
- Complimentary Room Pricing on page 412
- Weekday and Weekend Pricing on page 414
- Calculating Weighted Average Room Rates on page 415
- Pricing and the Negotiation Floor on page 415
- Minimum and Maximum Price on page 416

Pricing and Room Occupancy

Any time a group sale occurs, the sales user captures occupancy information that is applied to the entire room block. This information includes:

- **Occupancy Percentage.** The percentage of rooms that are single, double, triple, and quads.
- **Occupancy Price Offsets.** The pricing offsets that should be applied for each different type of occupancy.

Table 71 shows the contracted value and price for a standard room on three different dates.

Table 71. Example Contracted Value and Price for Standard Room on Different Dates

Room Type	Date	Contracted	Price
Standard	Jan. 5	100	100
Standard	Jan. 6	200	110
Standard	Jan. 7	300	120

Assume that the following information is entered in the Room Block Info record:

Occupancy %

- Single % = 50
- Double % = 50

Occupancy Price Offset

- Double Price Offset = 20

The following actions occur during weighted average price calculations:

- The room price is retrieved for each room type in the Room Block Line Items list.
- The system calculates the weighted average price for each room type.
- After the weighted average price is calculated, the price offsets are applied.

In this example, the weighted average price for the 50% single-room type occupancy is:

(50 X 100 + 100 X 110 + 150 X 120) / (50 + 100 + 150) = $113.33

The weighted average price for double rooms occupancy is:

Weighted Average Price (Double Occupancy) = Weighted Average Price (Single Occupancy) + Price Offset for double.

Weighted Average Price (Double Occupancy) = $113.3 + $20 = $133.33

Complimentary Room Pricing

Sales representatives and sales managers can specify a number of complimentary sleeping rooms for an event. The complimentary number is not factored in when room availability is checked, but the number is relevant when the weighted average sleeping room rate is calculated. Complimentary rooms also are not factored into the calculation of total revenue that appears in the Quote Summary report.

For example, assume a quote has been generated for a group event, and the information appears in the Quote's Room Blocks view. The specified occupancy for the group is single, and the property does not set different rates for weekends and weekdays.

The complimentary numbers of rooms are included in the contracted, projected and blocked numbers. As Table 72 shows, on July 5 there are 100 contracted rooms that include 10 complimentary rooms and 90 rooms that are not complimentary.

Table 72. Contracted Rooms Including Complimentary and Non-Complimentary Rooms

Room Type	Contracted	Projected	Blocked	Comp	Single Price	Date
STD	100	90	95	10	150	July 5
STD	130	80	90	20	120	July 6

The total rooms that are contracted and complimentary for this event is taken into account when revenue is calculated, as Table 73 shows.

Table 73. Calculated Revenue for Contracted and Complimentary Rooms

Date	Contracted	Complimentary	Revenue Calculation #	Single Price	Revenue
July 5	100	10	90	150	150 X 90 = 13500
July 6	130	20	110	120	110 X120 = 13200

Using these figures, the calculations for Total Revenue and Total Rooms Nights are:

- Total Revenue=13500 + 13200 = 26700
- Total Room Nights = 100 + 130 = 230

Table 74 shows the Average Rate calculation, including Complimentary rooms.

Table 74. Average Rate Calculation Including Complimentary Rooms

Start Date	End Date	Total Room Nights	Total Revenue	Average Rate with Comp
July 5	July 6	230	26700	26700 / 230 = 116

Table 75 shows the Average Rate calculation, excluding Complimentary rooms.

Table 75. Average Rate Calculation Excluding Complimentary Rooms

Start Date	End Date	Total Room Nights	Total Revenue	Average Rate
July 5	July 6	230	30600	30600 / 230 = 133

The user can view both the Average Rate and the Average Rate with Complimentary Rooms by navigating to the Quote's Room Blocks Negotiation Rates view.

Weekday and Weekend Pricing

Some properties employ business rules that require pricing weekdays differently from weekends because the guest profile on weekdays (often business travelers) is different from that on weekends (often leisure travelers). In this scenario, each room block would have a weekday rate and a weekend rate. For properties that do not use differing rates for weekdays and weekends, the average rate is always applied for each room type during the event.

The following scenarios illustrate the differences in room revenue for a property that uses different weekday and weekend pricing, and a property that uses the average rate for each day of the week.

Scenario for Using Weekday and Weekend Pricing

An three-day event is planned, with room blocks booked for Monday, Tuesday and Wednesday. Each property defines weekdays as Monday through Friday, and weekend days as Saturday and Sunday.

Property 1 uses weekday and weekend rates, while Property 2 uses the average rate for each day of the week. Property 2 does not have weekday and weekend rates.

As Table 76 shows, for Property 1 the total room price for the three days equals $10,000 ($2000 + $6000 + $2000). The average weekday rate is calculated as $10,000 / 40 total rooms = $250. The average weekend rate is null as the event did not continue into the weekend.

The total room price is the same for Property 2, which uses an average rate regardless of the day.

Table 76. Total Room Price Calculation Using Weekend-Weekday Rate and Average Rate

Property 1 and Property 2	Monday	Tuesday	Wednesday
Quoted # Standard Rooms	10	20	10
Price per Room	200	300	200
Total Room Price per Day	2000	6000	2000

Scenario for Using Average-Rate Pricing

An event lasts two days and requires room blocks for Tuesday and Saturday. In this case, there are weekday and weekend rate for Property 1. Table 77 shows Property 1 with the following rates:

- Average Weekday Rate = $2000/10 = $200
- Average Weekend Rate = $3000/10 = $300

Table 77. Weekday and Weekend Rate Calculation for Property 1

Property 1	Tuesday (Weekday)	Saturday (Weekend)
Quoted # Standard Rooms	10	10
Price per Room	200	300
Total Room Price per Day	2000	3000

For Property 2, only one calculation is required to calculate the average rate for each room type as shown in the following calculation:

- Average Rate = $5000 / 20 = $250

In essence, weekend and weekday pricing for sleeping rooms is only weighted average pricing.

Calculating Weighted Average Room Rates

For quotes involving room rates that span multiple days, the weighted average room rate is returned in the Quote Room Block Negotiation Rates view.

To calculate the weighted average room rate, the adjusted benchmark room rates for each room type are retrieved and then summed. The total is then divided by the total room nights for each room type. The value returned to the quote is a weighted average of the various prices over multiple days.

For example, the Weighted Average Room Rate equals the sum of room revenue across multiple days for each room type divided by the sum of room nights for each room type.

Pricing and the Negotiation Floor

The *negotiation floor* defines the maximum discount that the sales representative or sales manager can give to the customer after all prices have been returned by the pricing engine. The Negotiation Rate and Weekend Negotiation Rate cannot be set below the Average Floor and Weekend Floor, respectively. If the sales representative or sales manager wants to discount below the negotiation floor, then that user can submit a request to the revenue manager to approve the discount. For more information, see Chapter 24, "Revenue Management."

Table 78 shows an example of pricing for a property that does not have different rates for weekends and weekdays.

Table 78. Example Pricing for Property with Weekday and Weekend Rates

Date	Room Type	Contracted	Single Price	Day	Floor
Jan. 5	Standard	100	200	Sun	180
Jan. 6	Standard	30	150	Mon	135

Given this example, Table 79 shows the values that appear in the Quote Room Blocks Negotiation Rates view.

Table 79. Values Appearing in Quote Room Blocks Negotiation Rates View

Start Date	End Date	Average Rate	Average Floor	Negotiation Rate
Jan. 5	Jan. 6	188.46	169.62	188.46

The Average Rate is calculated as:

(100 X 200 + 150 X 30) / 130 = $188.46

The Average Floor is calculated as:

(100 X 180 + 30 X 135) / 130 = $169.62

On occasion, it is possible that the system calculated average rate falls below the average floor. In that case, the Average Rate is set to the same as Average Floor. In the example given in Table 79, if the real average rate from the calculation is less than 169.62 (for example, if it is at 165.50), it shows as 169.62.

Minimum and Maximum Price

The user can define the minimum and maximum price for each room type. If minimum and maximum prices are not defined, then the minimum and maximum prices are null as opposed to zero. Setting minimum and maximum prices makes sure pricing does not go below or above the set prices after all pricing rules are applied.

Suite Pricing

The sales representative has the option of booking a suite category as a room block line item and then booking a specific suite if he or she chooses to. In addition, after a specific suite has been booked, the customer can choose to schedule a function within the specific suite. The following example illustrates this situation.

In this case, a specific suite has been booked as a sleeping room and is priced as a sleeping room rather than a function space. The specific suite is booked as a sleeping room from 4 P.M. until 9 A.M. the next morning. If the customer decides to schedule a function from 5 to 6 P.M. within this specific suite, which the customer has paid for, the function is not charged an additional fee. In other words, the customer is not charged twice for using the same space for different purposes.

24 Revenue Management

This chapter explains the revenue management evaluation process that occurs when a sales representative sends an opportunity quote to the revenue manager for evaluation. It includes the following topics:

- Hospitality Revenue Management on page 418
- Scenario for Revenue Management on page 418
- Process of Revenue Management on page 419
- Completing the Revenue Evaluation Form on page 419
- Submitting a Quote for Revenue Evaluation on page 421
- Evaluating the Event Quote on page 422
- About Quote Evaluation Responses on page 423
- Viewing the Quote Evaluation Response on page 425
- Updating and Reducing the Negotiation Floor Rate on page 425

Hospitality Revenue Management

The Revenue Management Evaluation process occurs after an opportunity is captured and property-specific quotes are generated. The sales representative continues to work with the customer to update the quote. During this process, the sales representative may need to modify quote information and submit the quote to a revenue manager who reviews and approves the changes. Typical conditions that may trigger the revenue management evaluation process include:

- The profit variance of a quote is negative.
- The sales representative wants to reduce the sleeping room rates below the negotiation floor.
- The sales representative wants to overbook some functions.

Scenario for Revenue Management

This scenario provides an example of a process performed by hospitality sales representatives and revenue managers. Your company may follow a different process according to its business requirements.

A customer is interested in a particular property for an event. However, the profit variance is negative for the property quote, and the sales representative must send it to the property revenue managers for review.

The sales representative completes the revenue management evaluation form, adds comments to the quote, and submits the quote to the revenue manager. The revenue manager at the property reviews the evaluation, the quote summary, and the comments, and approves the quote with some conditions.

Process of Revenue Management

This topic lists the tasks typically performed by sales representatives and revenue managers when managing revenue evaluations for a quote. Your company may follow a different process according to its business requirements.

To manage revenue evaluations for a quote, perform the following procedures:

1 Completing the Revenue Evaluation Form on page 419

2 Submitting a Quote for Revenue Evaluation on page 421

3 Evaluating the Event Quote on page 422

4 Specifying Evaluation Activities on page 423

5 Creating an Evaluation Response on page 423

6 Revenue Manager Approval of a Quote with a Negative Profit Variance on page 424

7 Viewing the Quote Evaluation Response on page 425

8 Updating and Reducing the Negotiation Floor Rate on page 425

Completing the Revenue Evaluation Form

Using the Quote screen's Evaluation view, the sales representative documents the revenue information that the revenue manager considers when making the decision to approve or reject the quote for the event. The evaluation form typically provides the following information:

- Incremental revenue sources that may result from the group or event. The sales representative can enter more than one incremental revenue source.
- Notes on potential future business that may result from the event.
- Commission information. More than one commission can be entered.
- The date by which the evaluation should be completed so that the sales representative can respond to the customer.
- The sales manager's comments.

This task is a step in Process of Revenue Management on page 419.

To complete the revenue evaluation form

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, query for and select the required quote, and then click the link in the Name field.

3 Click the Evaluation view tab.

4 In the Evaluation form, set the value in the Evaluation Status field to Not Applicable, and then complete the fields.

The following table describes some of the fields in the Evaluation form.

Field	Comments
Evaluation Status	The status of the evaluation. Set the value in the Evaluation Status field to Not Applicable.
Evaluation Due Date	The date by which the evaluation is to be completed.
Commission	(Optional) The commission earned for this quote. You may add a number of different commission records for different services rendered during the quote phase. Using the select button in the Commission records field, you can associate new and existing commission records with the evaluation. When creating new records, you can only enter either a commission amount or commission percentage.
By Pass	Select this check box if you want to bypass the quote evaluation, and do not wish to complete an evaluation of the quote.
Value Rating	Provide a rating for the value of the quote.
Incremental Revenue Source	(Optional) Can be used to indicate if there is to be an incremental source of revenue arising from the quote. Using the select button in the Increment Revenue Source field, you can associate new or existing revenue source records with the evaluation.
Historical Quote Name	(Optional) The name of a quote made previously. Historical quotes allow the revenue manager to reference the revenue brought in by a customer at other properties. Using the select button in the Historical Quote Name field, you can associate other historical quotes with the evaluation.
Complexity Rating	A rating for how complex this quote was to create and develop.
Potential Future Business	The details (if available) on how future business with the customer could be developed.
Event Manager	The user ID of the event manager.
Sales Manager	The user ID of the sales manager.
Manager Comments	This is a multi-value field, so that iterations of the quote between the sales manager and the event manager can be tracked. Using the select button in the Manager Comments field, you can enter managers' comments.
Comments Summary	Any relevant evaluation comments about the quote if necessary.

Submitting a Quote for Revenue Evaluation

A quote is automatically submitted to the designated revenue manager for review when the sales representative resets the value in the Status field of the evaluation form. The sales manager can access the evaluation in the Evaluation screen list. After the evaluation is submitted, the evaluation form and the quote cannot be modified by the sales representative.

The status of the quote evaluation changes as the revenue management evaluation progresses through various stages. Table 80 describes the status conditions during the revenue evaluation process.

Table 80. Revenue Evaluation Statuses

Status	Description	Next Status
Not Applicable	The default state. This status indicates that the quote has not yet been submitted for evaluation.	Submitted
Submitted	This status is set by the sales representative to submit the quote to the revenue manager. This option is only available if the revenue evaluation for the quote goes through multiple iterations.	In Process
In Process	This status indicates that the revenue manager has started to review the quote.	Approved, Rejected
Approved	The revenue manager sets this status to indicate that the evaluated quote is approved.	Submitted
Rejected	The revenue manager sets this status to indicate the evaluated quote is not approved.	Submitted

This task is a step in Process of Revenue Management on page 419.

To submit a quote evaluation form to the revenue manager

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Evaluations view tab.
5. In the quote evaluation form, set the value in the Evaluation Status field to Submitted.

Evaluating the Event Quote

Revenue managers can access submitted quotes for evaluation from the Home Page's My Evaluations list or from the Evaluations screen, which includes all submitted quotes for evaluation. Rejected and Accepted evaluations do not automatically appear in the list.

The National Revenue Manager typically views evaluations across all organizations, while the property revenue manager typically views evaluations for a particular property. The My Cluster Evaluations screen allows revenue managers to look at all quotes that have been submitted for evaluation to a cluster revenue manager for all the properties within that cluster.

By clicking links in the evaluation list, the revenue manager can navigate to related screens and views to see relevant information about the function and the account, as described in Table 81.

Table 81. Navigation Links in the Quote Evaluation Form

Field Link	Navigation Destination
Quote Name	Quotes > Functions view
Account	Accounts > More Info view
Evaluation Status	Evaluation > Evaluation Response view

NOTE: Before the revenue manager can begin reviewing the evaluation information, the evaluation status is set to In Progress.

This task is a step in Process of Revenue Management on page 419.

To review a submitted quote evaluation

1. Navigate to the Evaluations screen > Evaluation list view.
2. In the Evaluation list, query for the evaluation record.

   The National Revenue Manager can filter evaluations by choosing All Evaluations Across Organizations from the visibility list.
3. In the Evaluation record, change the value in the Evaluation Status field to In Progress, and review the evaluation information.
4. Scroll down to the Quote Summary form, and review the Function Space, Sleeping Rooms, and other general information.
5. In the Evaluation record, click the link in the Evaluation Status field.
6. From the Evaluation Response view, click the Evaluation Summary view tab to review the submitted evaluation information and sales manager comments.

About Quote Evaluation Responses

As part of the quote evaluation process, the revenue manager can create and assign quote evaluation activities to other individuals. The manager can monitor the status of these activities from the Quote's Activities screen to see whether or not the activities have been carried out and what the completion of these activities means to the quote. At the conclusion of the evaluation, the revenue manager decides whether or not to approve the event quote. If the quote is rejected, the revenue manager can provide response details in the response record.

Responding to a Quote Evaluation includes the following tasks:

- Specifying Evaluation Activities on page 423
- Creating an Evaluation Response on page 423
- Revenue Manager Approval of a Quote with a Negative Profit Variance on page 424

This task is a step in Process of Revenue Management on page 419.

Specifying Evaluation Activities

The revenue manager can specify prioritized evaluation activities with due dates and assign the activities to sales team members associated with the property.

This task is a step in Process of Revenue Management on page 419.

To assign evaluation activities

1. Navigate to the Evaluations screen > Evaluation list view.
2. In the Evaluation list, select the quote evaluation, and click the link in the Evaluation Status field.
3. In the Evaluation Response list, select the response record, and scroll down to the Activities list.
4. In the Activities list, create a new record, and complete the fields.
   - The Due date, Planned Start, and Last Updated fields default to the current date.
   - The Activity Type, Status, Assigned To, and Created By fields are also automatically populated.
5. In the Assigned To field, select the individual to whom the activity is assigned.
6. (Optional) In the Last Name field, select the contact person.

Creating an Evaluation Response

When the revenue manager responds to the sales representative, the Evaluation Status field is updated with either Rejected or Approved. After responding, the revenue manager creates an evaluation response record to communicate additional details about the response.

Perform the steps in the following procedure to create a quote evaluation response for the sales representative.

This task is a step in Process of Revenue Management on page 419.

To create an evaluation response

1. Navigate to the Evaluation screen > Evaluation list view.
2. In the Evaluation list, query for the evaluation record.
3. In the Evaluation record, click the link in the Evaluation Status field.
4. In the Evaluation Response list, add a record, and complete the fields.

   The following table describes some of the fields.

Field	Comments
Suggested Alternates	Suggested alternatives to the quoted items.
Response	This field is used by the revenue manager to summarize the response.
Required Release Date	The required date by which the status of the booking must be Definite or Released.
Required Cut Off Date	The date by which quoted items must be picked up or made available to others.
Room Attrition	Fee charged to the customer if the room block pickup is below a certain number. The fee is typically based on a scale.
Contract Approval Required	This check box indicates whether the contract for the event must be formally approved.
Date	Automatically populated with the current date.
Contract Clauses	Specific clauses or conditions that need to be included in the contract.
Catering Attrition	Fee charged to the customer if the catering revenue or attendance for the functions falls below a certain value. The fee is typically based on a scale.

Revenue Manager Approval of a Quote with a Negative Profit Variance

In some instances, when the sales representative generates a quote, the quote profit variance is negative, and the quote is typically sent to the revenue manager for approval.

The sales user cannot change the status of the quote from Prospect to Hold without getting the revenue manager's approval. When approval is received, the sales user can change the quote status to Hold or higher, such as T1, T2 or Definite.

This topic is a step in Process of Revenue Management on page 419.

Viewing the Quote Evaluation Response

After the revenue manager creates an evaluation response, the sales representative may view the details of the manager's response using the Quote Evaluation Response view. This is a read-only view, and the sales representative cannot change the evaluation response. The ability to view the evaluation response may be useful to the sales representative when the evaluation has been rejected, and the sales representative needs to take further action before the evaluation is accepted.

This topic is a step in Process of Revenue Management on page 419.

To view the evaluation response for a quote

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for and select the required quote, and then click the link in the Name field.
3. Click the Evaluations view tab, and then click the Quote Evaluation Response link.
4. Review the appropriate response in the list, as well as an activity associated with the response. For more information about the fields in the Quote Evaluation Response list, see Creating an Evaluation Response on page 423.

Updating and Reducing the Negotiation Floor Rate

In some cases, the sales representative submits a quote evaluation to the revenue manager to request an override of the established negotiation floor rate. This situation typically occurs when the customer is bringing in a great deal of function space revenue and asks for a discount on sleeping rooms.

The sales representative first attempts to update the standard negotiation rate for the sleeping rooms. If the new rate is less than the established negotiation floor rate, the sales representative is prevented from completing the rate update. The revenue manager can, however, reduce the negotiation floor for the quote.

Revenue managers may decide that a profit and revenue advantage exists if the customer is given a rate that is lower than the established negotiation floor for a particular booking or event. By modifying the established negotiation floor rate, the revenue manager can set a new negotiation floor that is not constrained by the established price.

For example, a customer plans to spend a lot of money on catering products for his event and would like a discount on sleeping rooms. The property's benchmark rate for a sleeping room is $100 and the negotiation floor is set at $100. The sales representative wants to offer the customer a sleeping room rate of $90 dollars as an incentive for future business. The sales representative makes the recommendation in the comments field of the quote, and sends the quote to the revenue manager for evaluation.

After reviewing the quote, if the revenue manager agrees that the $90 rate is justified, the revenue manager changes the negotiation floor rate to $90.

Updating the Existing Negotiation Rate (Sales Representative)

Perform the following procedure to update the negotiation rate for a room block. This procedure assumes that the room block records have already been created for the quote.

This task is a step in Process of Revenue Management on page 419.

To update the negotiation rate

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. From the Room Blocks form, scroll down and click the Negotiation Rates view tab.
5. In the Negotiation Rates list, click Calculate Rates.

   A new record appears in the Negotiation Rates list.
6. In the new record, update the value in the Negotiation Rate field.

   If the proposed negotiation rate is lower than the negotiation floor rate, an error message appears when the user attempts to save the Negotiation Rate record.

Modifying the Negotiation Floor Rate (Revenue Manager)

When the quoted negotiation rate for a room block is lower than the property's established negotiation floor rate, the revenue manager must modify the existing negotiation floor rate so that the sales representative can successfully apply a discounted rate.

To modify the negotiation floor rate

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. From the Room Blocks form, scroll down and click the Negotiation Rates - Manager view tab.
5. In the Negotiation Rates - Manager list, modify values in the Avg Floor and Weekend Floor fields.

After the revenue manager has modified the negotiation floor rates, the sales representative can set the negotiation rate for the room block to a value greater than or equal to the updated Avg Floor or the Weekend Floor rates.

25 Finalizing a Quote, Turnover, and Confirming Event Details

This chapter describes the procedures that end users, such as event managers, sales managers and sales representatives would use to finalize a quote, complete the turnover to event management, and confirm post-quote details with the customer. It includes the following topics:

- Scenario for Finalizing a Quote, Turnover, and Confirming Event Details on page 428
- Process of Finalizing a Quote and Managing Turnover on page 428
- Generating an Agreement for the Quote on page 428
- Setting an Event Quote Status to Definite on page 430
- Completing and Submitting the Event Turnover Checklist on page 430
- Reviewing and Accepting or Rejecting the Turnover on page 432
- Gathering and Confirming Event Details on page 433

Scenario for Finalizing a Quote, Turnover, and Confirming Event Details

This scenario provides an example of a process performed by hospitality sales representatives and event managers. An end user's company may follow a different process according to its business requirements.

The customer reviews all property quotes with the sales representative, and decides that one quote is acceptable. The sales representative generates an agreement for the quote, and sends it to the customer for final approval.

The customer signs the agreement, and returns it to the sales representative, who changes the status of the quote to Definite. All other quotes associated with the opportunity are automatically marked as *turndown* when the selected quote's status is made Definite.

The sales representative completes the Turnover checklist, changes its status to Submitted, and submits it to the events director. As a result, the Turnover checklist is automatically sent to the events director, and the turned-over quote appears on the director's home page.

The events director accepts the turnover and then chooses the events team, designating one team member as the event manager. The event manager discusses and confirms details with the customer, and begins some event preparations before starting the ordering process.

Process of Finalizing a Quote and Managing Turnover

This topic lists the tasks typically performed by sales representatives and event directors when finalizing a quote and managing turnover tasks for an event. These tasks are performed after a final quote is selected. Your company may follow a different process according to its business requirements.

To finalize a quote and manage turnover tasks for an event, perform the following procedures:

1. Generating an Agreement for the Quote on page 428
2. Setting an Event Quote Status to Definite on page 430
3. Completing and Submitting the Event Turnover Checklist on page 430
4. Reviewing and Accepting or Rejecting the Turnover on page 432
5. Gathering and Confirming Event Details on page 433

Generating an Agreement for the Quote

After a customer agrees on a quote, the sales representative generates a formal agreement that must be signed and returned by the customer. If the customer makes changes to the agreement, the sales representative must generate a new agreement that incorporates the changes and return it to the customer for signature.

This task is a step in Process of Finalizing a Quote and Managing Turnover on page 428.

To generate an agreement from a quote

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Name field.
4. Click the Agreements view tab.
5. In the Agreements list, click AutoContract.

   The following table describes the fields in the record.

Field	Comments
Agreement #	The identification number for the agreement, which is automatically generated.
Name	The name of the agreement. The name is automatically populated with a system-generated value, and can be changed.
Type	The type of agreement. The default value is Contract.
Status	The status of the agreement. The default value is In Progress.
Account	The account associated with the opportunity and quote.
Last Name	The last name of the primary contact.
First Name	The first name of the primary contact, which is automatically populated, based on the person who is chosen in the Last Name field.
Valid	This field indicates whether the agreement is valid and is automatically populated when all the required information about the agreement has been entered.

6. In the Agreements list, click the link in the contract Name field to navigate to the Agreements Documents view.
7. From the Agreement form, click the Documents view tab.
8. In the Documents list, click AutoDocument.
9. Click Generate Draft to generate a draft of the document.

NOTE: A draft of documents can only be created if the Proposal Generator is correctly configured. For more information about the Proposal Generator, see *Siebel Applications Administration Guide*.

Setting an Event Quote Status to Definite

When the signed agreement is received from the customer, the sales representative sets the quote status to Definite.

NOTE: Before setting the quote status to Definite, the user should verify that the quote does not have unreserved function spaces or room blocks. Functions or room blocks that do not have a status of Cancel or Lost/Turndown should have an inventory status of Reserved, Optioned or Overbook.

When the quote status is set to Definite, the status of other quotes associated with the opportunity are automatically updated to Lost/Turndown, and the following inventory is released:

- Function space
- Sleeping room
- Suite
- Asset

NOTE: If an event manager changes a nonparticipating property to Lost/Turndown after a quote has been made Definite, the inventory associated with the nonparticipating property is not released. A sales representative must manually release this inventory by changing the status of each line item to Unreserved.

This task is a step in Process of Finalizing a Quote and Managing Turnover on page 428.

To set the quote status to Definite

1. Navigate to the Quotes screen.
2. In the Quote form, query for the quote.
3. In the Quote form, change the value in the Status field to Definite and save the record.

NOTE: The system automatically generates a backup of the quote when the quote status is set to Definite. The status of the backup quote is set to Backup. When a user queries for a quote, two quotes appear, one with a status of Definite, and a second with the status of Backup. The backup quote is a read-only snapshot of the definite quote, and therefore cannot be modified.

Completing and Submitting the Event Turnover Checklist

The sales representative initiates the turnover process after the quote status is set to Definite.

This process begins with the *Turnover Checklist*, a predefined assessment template with related questions (attributes) that is set up by the administrator to make sure that conditions are met before the event is turned over to the event execution team. For more information on setting up assessment templates with attributes, see *Applications Administration Guide*. The sales representative completes the Turnover Checklist and submits it for approval.

The Turnover Checklist can be submitted for approval any number of times. Each time the Turnover Checklist is revised and resubmitted, the iteration is tracked in the turnover record.

This task is a step in Process of Finalizing a Quote and Managing Turnover on page 428.

To complete the Turnover Checklist

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Quote Name field.
4. From the Quote form, click the Turnover view tab.
5. In the Turnover list, add a record, and then click the select button in the template field to choose a predefined template.
6. Complete the remaining fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Active	Indicates the active turnover record for the quote. When a new record is created, the Active flag is set. However, if the user creates a second turnover record, the user must manually set it to active.
Template	The predefined turnover assessment template.
Iteration Name	A unique identifier for the iteration which is automatically populated.
Description	Automatically populated based on the description of the selected assessment template.
Status	The turnover status. For example, submitted, accepted, and rejected.
Turnover Date	The date the quote is turned over to event management. This value is a read-only, system-generated date and time.
Turnover To	An employee at the property. The selected employee is automatically added to the team.
Assessment Score	The actual score gained in the overall assessment of the event to see whether or not the event was successful. This is calculated based on the values specified in the turnover questions.
Assessment %	The percentage score gained in the overall assessment of the event to see whether or not the event was successful. This is calculated based on the values specified in the turnover questions.

   When the record is saved, the checklist questions appear in the Turnover Questions subview.

7. Scroll to the Turnover Questions view, complete each question by updating the Values field, and save the records.

   NOTE: A score is automatically calculated based on the values selected for the questions.

To submit the Turnover to Events Management

1. In the Turnover list, select the Turnover record.
2. In the record, change the values in the following fields:
   a. In the Turnover To field, select the person who is reviewing the Turnover Checklist.

      If no value is entered in this field, the submitted turnover record appears in the list on the Turnover Evaluation screen.

   b. In the Status field, change the value to Submitted.

Reviewing and Accepting or Rejecting the Turnover

When the Turnover Checklist is submitted to the event manager, the turnover record becomes read-only, and the Turnover Date field is populated with the current date. The active turnover record appears on the home page of the designated event manager or team member, and it also appears in the Turnover Evaluations screen list.

After reviewing the turnover, the event manager can either reassign the Turnover Checklist or accept or reject it. The event manager reassigns the Turnover Checklist by updating the Turnover To field.

There are three levels of visibility for turnover evaluations as follows:

- **My Turnover Evaluations.** This list shows all evaluations turned over to a specific person on a team.
- **My Cluster Turnover Evaluations.** This list shows all turnover evaluations for a cluster of properties.
- **All Turnover Evaluations.** This list shows all turnover evaluations for a particular property.

This task is a step in Process of Finalizing a Quote and Managing Turnover on page 428.

To review the Turnover Checklist

1. Navigate to the Turnover Evaluations screen > Turnover List view.
2. In the Turnover List, query for the Turnover Checklist.
3. Review the checklist, update the status to In Process, and then change the status to either Approved or Rejected.

   If the turnover is rejected, the event manager completes the Reason Turnover Declined field to provide the reason for rejecting the turnover.

   When the turnover is Approved or Rejected by the event manager, the Accepted By and Accepted Date fields are automatically populated.

   NOTE: If the Quote Turnover is accepted, the event manager owns the event. If the Quote Turnover is rejected, the turnover record is returned to the sales representative for revision and submission again.

Using the Turnover Evaluations Calendar

The Turnover Evaluations Calendar displays the quotes that have been assigned to an event manager or to an event manager's team. The quotes are displayed in the calendar based on their arrival dates. This is useful for an event manager who needs to accept turnover evaluations. If a quote's arrival date is approaching, then the event manager can use the Turnover Evaluations list to the right of the calendar to accept or reject the evaluation.

NOTE: In order for an event manager to view quotes in this view, the Event Manager field for the quote must be populated with that event manager's name.

To use the Turnover Evaluations Calendar

1. Navigate to the Turnover Evaluations screen > Calendar view.
2. Examine quotes with an upcoming arrival date.
3. In the turnover evaluations list to the right of the calendar, query for turnover evaluations associated with the relevant quotes.
4. Accept or reject the turnover evaluations as appropriate.

Gathering and Confirming Event Details

After the turnover process, the event manager verifies event details with the customer and updates event information if necessary, using the Quote screen's views.

This topic is a step in Process of Finalizing a Quote and Managing Turnover on page 428 and includes the following related topics:

- Confirming Sleeping Room Details on page 433
- Confirming Function Space Details on page 434
- Gathering and Confirming Function Details on page 434
- Gathering and Confirming Additional Requirements for the Event on page 435
- Event Change Management on page 435

Confirming Sleeping Room Details

The event manager, using the Room Block and Room Block Line Item view, confirms and updates occupancy information, the method of reservation, the billing method, and suites information.

From the Room Block Line Items view, the event manager can perform the following tasks:

- Reserve Room Blocks
- OverBook Room Blocks
- Cancel Room Blocks
- Copy Room Blocks

For more information, see Chapter 17, "Managing Property-Specific Event Quotes."

Confirming Function Space Details

Using the Quote screen's Functions and Function Line Items views, the event manager:

- Assigns the function space category bookings to the specific space using the Function space diary.
- Creates and confirms 24-hour hold functions. The event manager can create 24-hour hold functions to hold the rooms in the intervening periods between two functions booked by the same party.
- Adds additional detail to the planned functions, and confirms the function space information such as agenda, timing, and setup style.

From the Functions Line Items view, the event manager can perform the following tasks:

- Reserve
- Next Fit
- Option
- Reprice
- Reprice All
- AutoBook
- Double Book/Rerent
- The event manager can shift the times of the functions, using the Timeshift button.

For more information, see Chapter 17, "Managing Property-Specific Event Quotes."

Gathering and Confirming Function Details

The event manager begins finalizing equipment and asset needs, contacts specialists and experts for complex events, and arranges for sample tastings of proposed banquet fare.

- **Equipment.** If the event requires equipment such as audiovisual products, the event manager adds equipment and other complex products using the Quote Functions Line Items view. The Product Administration screen may be used to refine the equipment to the needs of the customer.
- **Destination Management Information.** The event manager adds destination management details in the Quote Notes view.
- **Menu.** The event manager begins to design a complex menu using the Quote Function Line Item view (or the Function screen's Line Item view). The menu is added as a line item. For more information about designing a menu for an event, see "Creating a Custom Menu or Package for a Function" on page 349.
- **Decoration and Presentation.** In the Function's Notes view, the manager enters details on items such as linen color and proposed settings.

- **Catering.** Event managers add catering products such as cutlery, tables, chairs, and so on, which must be reserved. In the Quote Function Line Items view, the manager uses AutoBook to reserve the items and Double Book if necessary.
- **Taste Panel.** For complex events, the event manager arranges for the customer to participate in a taste panel, and adds the proposed date information in the Quote Notes view. The manager creates activities for a proposed setup featuring menu items, which can be sampled by the customer, and assigns the activities to individuals on the banquet staff. These activities can be added in the Quote > Activities view.

Gathering and Confirming Additional Requirements for the Event

The event manager also verifies the following additional requirements for the upcoming event are met:

- **Billing Information.** Using the Quote screen's billing view, the event manager compares Bill To Account and Bill to Contact information, verifies that Group master or House accounts are set up, and also confirms that the credit approval process is completed.
- **Parking and Transportation.** In the Quote screen's Notes view, the event manager adds any special requests for parking and transportation and notes any obvious patterns in arrival and departure times. This information helps management estimate requirements for front desk staffing and also underscores potential parking and transportation issues. The Notes view can also be used to detail V.I.P. arrangements.
- **Special Requests.** Using the Quote screen's Room Block Line Items view, the event manager records special requests for V.I.P. and staff sleeping rooms in the Room Notes field.

Event Change Management

During the process of confirmation of event details, the customer may decide to make significant changes to the quoted event, such as date changes and cancellations. After gathering the new requirements, the event manager may consult with the sales team to determine a course of action.

These actions might include:

- Discussions with revenue managers, and resubmission of the Quote Evaluation. For more information on the evaluation process, see Chapter 24, "Revenue Management."
- Creating a quote activity for the sales representative to determine if the event can be rebooked.

26 Generating and Managing Event Orders

This chapter describes the tasks that sales representatives, event managers, and sales managers must perform to generate an order for an event, which is a key process in event finalization activities. It includes the following topics:

- About Event Order Generation on page 437
- Scenario for Generating and Managing Event Orders on page 438
- Process of Generating and Managing Event Orders on page 439
- Generating Primary Event Orders on page 439
- Creating Function Orders on page 440
- Changing the Primary Event Order Associated with a Function on page 441
- Associating Event Orders with a Function Line Item on page 441
- Creating Functions from the Orders Screen on page 442
- Viewing All Line Items for an Order on page 443
- Adding Notes to an Event Order on page 443
- Adding Attachments to an Event Order on page 444
- Viewing the Total Discount for an Order on page 444
- Order Visibility on page 445
- Viewing Orders Associated with a Quote on page 445
- Viewing the Event Check Associated with an Order on page 446
- Viewing the BEO Specifications for an Order on page 446
- Viewing the Line Item Audit Trail for an Order on page 447

About Event Order Generation

When a quote includes all the necessary details, the event manager or sales manager generates an order for that quote. This order contains details of all functions and function line items associated with the quote.

If there are a number of functions associated with a quote, the event manager can add as many details as necessary about a function, and then generate a single order for this function instead of generating a primary order for the entire quote. Thus, a number of orders can be generated for any one quote.

Even though a separate order is usually created for each function associated with a quote, it is possible to generate a single order for all functions in the quote. This capability gives event managers the flexibility to generate orders as they see fit.

When an order is generated from a quote, all functions associated with the quote, line items associated with the functions, and all pricing information are copied to the order. Similarly, when an order is generated from a function, line items and related pricing information are copied to the order.

Different order types exist for different purposes. If there are multiple orders for the event, any combination of order types can be used. The following order types are available:

- **AVEO (Audio/Visual Event Order).** The AVEO may span several days.
- **BEO (Banquet Event Order).** Used as guides to event setup by generating BEO reports. This type is intended for covering one day of an event only.
- **No BEO.** This type indicates that the customer should not be invoiced for any line items on the selected order.

Each order is also associated with a price list. The price list determines the list price of each line item in the order. If there is a price list associated with the property where the parent event is located, that price list is the default price list for all the orders associated with the event.

Scenario for Generating and Managing Event Orders

This scenario provides an example of a process performed by an event manager to prepare for an upcoming event. Your company may follow a different process according to its business requirements.

The process for generating and managing event orders occurs after the event manager gathers sufficient detail to create the documentation necessary to execute the event.

The event manager can generate a primary order for the quote if necessary. This information includes all details about function inventory. Alternatively, the event manager may decide to generate a function order for each function associated with a quote.

After the orders have been generated, the event manager continues to modify order line items as needed to meet billing requirements and other conditions. In addition, the event manager performs other order-related activities such as adding notes or attachments to the order and updating primary orders to function records.

After the order records are created, event management users access different order records according to visibility rules that are in place.

Process of Generating and Managing Event Orders

This topic lists the tasks typically performed by event managers when generating orders and managing order details for a pending event. Your company may follow a different process according to its business requirements.

To generate orders and manage order details for a pending event, perform the following procedures:

1 Generating Primary Event Orders on page 439

2 Creating Function Orders on page 440

3 Changing the Primary Event Order Associated with a Function on page 441

4 Associating Event Orders with a Function Line Item on page 441

5 Creating Functions from the Orders Screen on page 442

6 Viewing All Line Items for an Order on page 443

7 Adding Notes to an Event Order on page 443

8 Adding Attachments to an Event Order on page 444

9 Viewing the Total Discount for an Order on page 444

10 Viewing Orders Associated with a Quote on page 445

11 Viewing the Event Check Associated with an Order on page 446

12 Viewing the BEO Specifications for an Order on page 446

13 Viewing the Line Item Audit Trail for an Order on page 447

Generating Primary Event Orders

The event manager creates the primary order by clicking Generate Order on the quote form. The primary order record defaults to the BEO type. When the order is generated, the following quote information is copied to the primary order:

- Account
- Contact
- Sales Team
- Property
- Price List
- Billing Account
- Billing Contact
- Quote #
- Sales Manager

- Event Manager

The primary order record is automatically associated with each function record in the quote, and each function line item is automatically copied to the order record.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To generate primary orders from the Quote screen

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote Name field.

   The application navigates to the Quotes screen > Functions View.
4. From the Quote Functions view, click Create Order.
5. The primary order record is created and the Order Function Line Items view appears.

Creating Function Orders

Function orders may be generated from individual functions associated with a quote. These function orders are used in place of a primary order for the entire quote. When an order is generated from functions, the following information is transferred from the quote to the function orders:

- Header information from the quote, including pricing details.
- Line items associated with the function, and their asset inventories and pricing information.
- The Event Manager and Sales Manager details are copied to the function order.

If an order is created at the quote level after function orders have already been generated, all functions and function line items are automatically associated with the primary order. A dialog box is displayed, however, warning you that an order has already been created at the function level and that if you continue and create the primary order, then all function line items are associated with the new order.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To create a function order

1. Navigate to the Quotes screen > Quotes List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Name field.
4. In the quote Functions list, select the required function record or multiselect the required function records.
5. From the Functions menu, select Create Function Order.

   The Orders Functions view is displayed, and an order, of the type BEO, with the following characteristics is displayed:

- If you selected one function record, then the order contains one function in the Functions list.
- If you selected multiple function records, then the order contains multiple functions in the Functions list.
- If a primary order already exists when you try to generate a function order, then a dialog box appears informing you that an order already exists for the selected order.
  - If you choose to continue, then the line items for the function order are automatically associated with the new function order. The new order also becomes primary for the function.
  - If you do not want the new order to become primary for the function, you can click Cancel, and the function order is not created.

Changing the Primary Event Order Associated with a Function

Many orders can be associated with a function, but there is only primary order for a function. The event manager can change the primary order associated with a function order.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To change the primary order associated with a function

1. Navigate to the Order screen > Event Order view.
2. In the Orders list, query for and select the required order record.
3. In the Order record, click the link in the Order # field.
4. In the Functions list, query for and select the required function record.
5. In the Function record, click the Select button in the Order # field, and in the Orders list select another order record.

   A dialog box appears prompting for confirmation to change all associated line items to the new order.
6. Click OK to accept all changes.
   - If you click OK, all the line items are moved to the new primary order.
   - If you click Cancel, line items in the new primary order are not updated.

Associating Event Orders with a Function Line Item

Function Line items can be associated with different orders. When the event manager associates another order with the function line item, the user can select from a list of orders already associated with the function.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To associate another order to a function line item

1. Navigate to the Order screen > Event Order view.
2. In the Orders list, query for and select the order record.
3. In the Order record, click the link in the Order # field.
4. In the Functions list, query for the Function record, and then scroll down to the function Line Items list.
5. Select the Line Item record, and click the Select Button in the Order # field.

   An Order dialog box appears with a list of orders associated with the function.
6. In the list, select another order record and click OK.

Creating Functions from the Orders Screen

New function and function line item records can be created using the Order screen's Functions view. When the event manager creates function records using the Order screen, the selected order automatically becomes assigned as the new function's primary order. In addition, the function's line item records are synchronized with the Quote screen's Functions view. For more information, see Synchronization Between Orders and Quotes on page 442.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To create a new function using the Orders screen

1. Navigate to the Order screen > Event Order view.
2. In the Orders list, query for and select the required order record.
3. In the Order record, click the link in the Order # field.
4. In the Order Functions list, create a new record, and complete the fields.
5. (Optional) Scroll down to the function Line Items list and create new function line items records.
6. Save the record.

Synchronization Between Orders and Quotes

Orders and quotes are separate entities at different stages of the event sales execution. Orders are generated from quotes after the quotes have been detailed as much as possible. Because event managers can modify order functions, line items, and line item attributes, a synchronization process is built into Siebel Hospitality to make sure that any changes made to the order are reflected in the associated quote and also that any changes made at the quote stage are reflected in the associated order. The synchronization process is capable of dealing with both simple and complex products.

Synchronization between orders and quotes operates as follows:

- **Functions.** The function entity is shared between orders and quotes. The same record is used to provide details to both orders and quotes, and so does not need to be synchronized.
- **Function Line Items.** A two-way synchronization occurs between quote line items and order line items. Whenever a order line item or quote line item is added, modified, or deleted, the associated quote or order line items are updated accordingly. Also, a list of fields, including Product, Quantity, Price, and Discount, are also synchronized for the modified line items.
- **Function Line Item Attributes.** A two-way synchronization occurs between quote line item attributes and order line item attributes. Whenever a order line item attribute or quote line item attribute is added, modified, or deleted, the associated quote or order line item attributes are updated accordingly. The attribute's Value field is also synchronized.

Viewing All Line Items for an Order

When all necessary line items are included in an order, the event manager views all of the line items in one view. This view provides details of the item quantity, price, discount amount, and so on for each line item. It provides a summary of all items for which the customer is to be charged.

NOTE: The Order Line Items view is read-only, and no modifications can be made from here.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To view all line items associated with an event order

1. Navigate to the Orders screen > Event Orders list view.
2. In the Event Orders list, query for and select the required event order.
3. Click the link in the Order # field, and then click the Line Items view tab.

   All line items associated with the order appear in the Line Items list.
4. Examine the Revised field to see whether or not the Line Item has been modified since the order was created.

   If there is a flag in this field, then the line item has been modified since the order was created. This means that pricing information for the order should be updated using the Reprice button.

Adding Notes to an Event Order

When necessary, the event manager can create specific notes and associate the notes with an event order. These notes can either be designated as internal (shared with the property staff) or external (public notes that can be shared with the staff and the customer). Some notes appear in sequenced order on generated reports. For more information, see Chapter 28, "Creating Hospitality Reports."

This task is a step in Process of Generating and Managing Event Orders on page 439.

To create notes for an order

1. Navigate to the Order screen > Event Order view.
2. In the Orders list, query for and select the required order.
3. In the Order record, click the link in the Order # field.
4. Click the Notes view tab, and then select internal or external from the drop-down list.
5. In the Notes list, add a record and select a value in the Type field.
6. In the Note field, enter the note text, and save the record.

   The Created By and Sequence # fields are automatically populated.

Adding Attachments to an Event Order

Event Managers can attach documents and other media files to an order. For example, the customer menu requirements might be attached to the order for later reference by event operations personnel.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To create attachments for an order

1. Navigate to the Order screen > Event Order view.
2. In the Orders list, query and select the required order.
3. In the Order record, click the link in the Order # field.
4. Click the Attachments view tab.
5. In the Attachments list, click either New File or New URL, and associate the attachment file or URL.

Viewing the Total Discount for an Order

After the event manager has added all details for an order as necessary, the manager can view the total discount for the order. The total discount for an order is equal to the summation of all the discounts that are applied to the individual order line items.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To view the total discount for an order

1. Navigate to the Order screen > Event Order view.
2. In the Orders list, query for and select the required order.
3. Examine the value in the Total Discount field.

   This is the total discount for the order.

Order Visibility

As with quotes, order records have visibility requirements that determine which orders the event user can view. Table 82 lists the types of users and the type of order records they are able to access.

Table 82. Event Users and Order Record Visibility

User	Visibility Rule
The Director of Events at a property needs to view all orders associated with a property.	The Director of Event Management needs to view all the orders for his or her property in the All Event Orders for My Property visibility list.
The Corporate Event Execution Vice President needs to query for orders across the system.	The Corporate Vice President for Event Execution can view all orders for the entire system in the All Event Orders Across Organizations visibility list.
The Regional Event Manager needs to query for all orders in a cluster of properties.	The Regional Event Manager can view all orders in a cluster of properties in the visibility list.
The Event Manager associated with the order needs to review the order on the manager's own home page.	The Event Manager who is part of the Orders Team for the order can view this order on his or her home page, in the Orders screen's My Event Orders visibility list.

Viewing Orders Associated with a Quote

The following procedure details how to view all orders associated with a quote.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To view all orders associated with a quote

1. Navigate to the Quotes screen > List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quotes record, click the link in the quote Name field.
4. Click the Orders view tab.
5. In the Orders list, review the orders.

The user can see more order detail by clicking the link in the Order # field and navigating to the Order screen.

Viewing the Event Check Associated with an Order

When an event check for an order has been generated, it can be accessed using the Event Checks view tab for the order. From this view, it is possible to navigate to the Event Checks screen, and also to post all event checks for the day. For more information about event checks, see Chapter 27, "Generating Event Checks."

This task is a step in Process of Generating and Managing Event Orders on page 439.

To view all event checks associated with an order

1. Navigate to the Orders screen > Event Orders list view.
2. In the Event Orders list, query for and select the required event order.
3. Click the link in the Order # field, and then click the Event Checks view tab.

   The event check associated with the order appears in the Event Checks list.

Viewing the BEO Specifications for an Order

Using the BEO Specifications tab, event managers can view the Banquet Event Order specifications for an order. These specifications govern how the line items are displayed in the BEO reports. The BEO Specifications list provides a list of all report headers that are associated with the property at which the event is to take place. If an event manager selects a report header in the list, the line items that are associated with the order automatically appear in the list. Event managers can also add comments to report headers. These comments then appear in the BEO Report.

For information about report headers, see Configuring BEO and SOE Report Headers on page 466. For information about reports, see Chapter 28, "Creating Hospitality Reports."

This task is a step in Process of Generating and Managing Event Orders on page 439.

To add comments to a report header

1. Navigate to the Orders screen > Event Orders list view.
2. In the Event Orders list, query for and select the required order.
3. Click the link in the Order # field, and then click the BEO Specifications view tab.
4. In the Report Headers list, select the required report header.
5. In the Comments list, perform the following steps:
   - a Create a new record.
   - b Add the required comment.
   - c Specify the sequence in which the comment should appear on the BEO report.

d Save the record.

Viewing the Line Item Audit Trail for an Order

When line items for an order are created, updated, or deleted, it is possible to view the audit trail for each line item to see how it was modified, when it was modified, and by whom it was modified. Such information is useful for tracking changes to the order between the time that it was created and when the order is frozen.

For information about configuring the Audit Trail for order line items, see *Siebel Applications Administration Guide*.

This task is a step in Process of Generating and Managing Event Orders on page 439.

To view the audit trail for order line items

1. Navigate to the Orders screen > Event Orders list view.
2. In the Event Orders list, query for and select the required order.
3. Click the link in the Order # field, and then click the Line Item Audit Trail tab.
4. Select the required line item in the list, and examine the fields to view changes for the item.

   The following table describes some of the fields.

Field	Comments
Order #	The unique number that identifies this order.
As Of	The date on which the change was made.
Updated By	The User ID of the person who made the change to the line item.
BusComp Name	The name of the business component affected by this change.
Function	The name of the function with which the line item is associated.
Line Item	The line item to which a change has been made.
New Value	This field displays the change that has been made.
Old Value	This field displays the previous value of the line item, prior to the change.

27 Generating Event Checks

This chapter describes how the event manager and sales representatives process event checks and create the Banquet Event Order (BEO) report before an event. It includes the following topics:

- About Event Checks on page 449
- Scenario for Generating Event Checks on page 450
- Process of Generating Event Checks on page 450
- Generating a Trial Check for an Event on page 450
- Updating Event Orders on page 451
- Generating an Event Check on page 452
- Adding Line Items to an Event Check on page 453
- Viewing Billable and Nonbillable Event Check Line Items on page 454
- Posting Event Checks on page 455
- Guest and Accounting Event Check Rules and Review on page 456
- Voiding an Event Check on page 463
- Event Check Reports and Printouts on page 463

About Event Checks

An *event check* is an invoice for the event. The process of generating an event check requires several subprocesses which take place before and after the event.

Users can either open an event check before or after an event. If necessary, the event manager can generate a trial check, which can be used to view total owed, the total service charges, or the total taxes for the event, and these amounts can be quoted to the customer. Generating a trial check does not cause the order to be frozen, which means that modifications can be made to the order after the trial check has been generated. The trial check can be generated many times before the actual event occurs.

After the event manager is satisfied that all details for the order have been added to the order record, that manager can generate an event check. When the event check is generated, the order is frozen, and no more changes can be made to the order. When an event check is opened, the Event Check header is created, and a unique number is assigned.

The event check process is usually initiated a few days before the event date. During this period, the operations team member can continue to add products to the orders. Products of type simple or complex are added to the order function line item. The products can have different taxes and service charge inclusions, which determine the way event checks are generated and displayed.

Scenario for Generating Event Checks

A few days before an event, the event manager generates a trial event check, including total amount due, service charges, and tax information, and provides it to the customer. The event manager also prints a BEO report and distributes it to all operations personnel. The operations personnel then use this report to verify the correct delivery of products for the event.

As the event begins, the operations team records the actual items consumed at the event. After the event has concluded, an event manager or an operations team member revises the line items specified in the event check, to make sure that it is up to date. This process helps event management verify that the event check represents the actual quantities and items used for the event.

When the updating process is complete, the event manager generates the event check, which freezes the order. At this point no more changes can be made to the order. However, line items can be added to the event check if necessary. As the order has been frozen, these changes do not appear in the order.

After the event check has been generated, the event manager can post it to the customer. In cases where changes need to be made after the event check is posted, the posted event check is voided. The user updates a copy of the voided event check and posts the new version of the check.

Process of Generating Event Checks

This topic lists the tasks typically performed by operations team members when creating and posting an event check. Your company may follow a different process according to its business requirements.

To create and post an event check, perform the following procedures:

- Generating a Trial Check for an Event on page 450
- Updating Event Orders on page 451
- Generating an Event Check on page 452
- Adding Line Items to an Event Check on page 453
- Viewing Billable and Nonbillable Event Check Line Items on page 454
- Posting Event Checks on page 455
- Reviewing Event Checks on page 462
- Voiding an Event Check on page 463

Related Topic

Generating and Printing a BEO Report on page 472

Generating a Trial Check for an Event

When a trial check is generated, an event check total is calculated for the selected event order that includes taxes and service charges.

The detailed Event Check record appears in the Event Check screen list. The status of the Event Check record is set to Trial, and the Post Date field remains blank until the event check is posted.

The Event Check line items show all the applicable taxes and service charges. The line items should display the same name, quantity, and unit price as the order's line items.

A trial check can be generated many times before and after the event occurs. However, the trial check can only be generated before an event check is opened. Generating a trial check allows the operations manager to review and update order details before the final event check is generated and posted.

This task is a step in Process of Generating Event Checks on page 450.

To generate a trial event check

1. Navigate to the Orders screen > Event Order list view.
2. In the Event Orders list, query for and select the event order.
3. In the Event form, click Trial Check.

   The trial check is generated, and the Event Checks screen > Line Items (Guest) view appears.

Updating Event Orders

Orders are updated many times before the actual event occurs; the operations staff associates product records with the order function line items to fulfill the order requirements. Orders may be updated before or after the trial check is generated. The product type (simple or complex) determines how the product appears on the event check.

When they associate products with the order, the operations team member enters tax and service charge inclusions by selecting flags (check boxes) on the product record. The tax and service charge inclusion flags affect the way the event checks are generated and displayed.

Table 83 lists the flags and describes how event checks are calculated when the flags are set.

Table 83. Tax and Service Charge Inclusive Flags and Rules

Flag	Description
Tax Inclusive	Indicates that the list price for the line item includes any applicable taxes. No additional tax charges are calculated.
Service Charge Inclusive	Service charges are included in the price. No additional service charges are calculated.

Table 83. Tax and Service Charge Inclusive Flags and Rules

Flag	Description
Complimentary	When this flag is selected, it prevents any charge for the selected line item by setting the item's price to zero and automatically selects the Waived check box. This flag is typically used for an item that is always provided at no charge. When it is selected for a line item that is a complex product, automatically sets the price to zero for each subsidiary line item.
Waived	This flag prevents any charge for the selected line item by setting the item's price to zero. When it is selected for a line item that is a complex product, also automatically sets the price to zero for each subsidiary line item. This flag is automatically selected when the Complimentary check box is selected. It is typically used when the regular charge for the item has been dropped as a result of negotiations with the customer. The price for the product is waived if the customer either is not satisfied with the product itself or its delivery.

Use the following procedure to associate products with an order and designate the tax and service charge options.

This task is a step in Process of Generating Event Checks on page 450.

To add products to the Order Functions view

1. Navigate to the Orders screen > Event Order list view.
2. In the Event Orders list, query for the order record.
3. In the Order record, click the link in the Order # field.
4. In the Order Functions list, query for the function.
5. Scroll down to the Line Items list, and then create a new line item.
6. In the new Line Item record, click the select button in the Item field to associate a product with the line item.
7. Select the appropriate Tax and Service Charge flags that apply to the product record, and then save the record.

Generating an Event Check

Operations managers and event managers can generate an event check for an individual event order record, or all orders that occur on a specified day.

When an event check is opened, the following actions occur:

- An event check header is created.
- The Event Check# field for the order is populated with a unique identifier.

- The Order Status field is updated to Event Check.
- Taxes and Services charges for the event are calculated.
- The order is frozen so that no more changes can be made to it.

The Event Check # includes a link to the Event Checks screen, which provides more detail on the generated event check. Only one event check can be opened for each order record; subsequent attempts to open an event check result in an error message.

This task is a step in Process of Generating Event Checks on page 450.

To generate an event check for an individual order

1. Navigate to the Orders screen > Event Order list view.
2. In the Event Orders list, query for the required order.
3. Select the order and click Open Check.

   The Event Check screen > Line Items (Guest) view is displayed.

To generate an event check for all orders in a day

1. Navigate to the Orders screen > Event Order list view.
2. Click Open Day.

   A dialog box appears that shows the current date.
3. Change the date to the date on which the function is to take place, and then click Open Checks.
4. In the Order screen > Event Orders list, select each order record for that specified date, and verify that each order has an event check associated with it.

Adding Line Items to an Event Check

In general, event checks are only generated when the event manager is sure that all details about the event have been added to the event order. However, on occasion (perhaps due to an oversight), the event manager may notice after the event check is generated that a product that was not added to the order was used at the event. In this case, it is possible to add extra line items to the event check. However, as the order has been frozen, the addition of line items at the event check stage do not appear in the order.

After the event manager has added line items or modified existing line items, the Refresh flag for the event check is automatically checked. Thus, the taxes and service charges for the event must be recalculated to appear in the event check.

This task is a step in Process of Generating Event Checks on page 450.

To add new line items to the check after the event

1. Navigate to the Event Checks screen > Event Checks List view.

2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check # field.
4. Scroll down to the Line Items Details form, and click New to add new line items that were used at the event.
5. Click the Attributes link, and change each line item's attributes as required.
6. For each item added or updated, select the item in the list, and click reprice to update the total price for the line item.

To revise existing items in the event check

1. Navigate to the Event Checks screen > Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check # field.
4. In the Line Items view tab, modify the existing line items as required.
5. Click the Attributes link, and change each line item's attributes as required.
6. For each item added or updated, select the item in the list, and click Reprice to update the total price for the line item.

To recalculate taxes and charges for the event check

1. Navigate to the Event Checks screen > Event Checks List view.
2. In the Event Checks list, query for and select the required list.
3. In the Event Check form, click Recalculate.

   The taxes and service charges for the event are recalculated.

To add line items to an event check

1. Navigate to the Event Checks screen > Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check # field, and then click the Line Items view tab.
4. In the Line Items list, create new records, and add line items as required.

Viewing Billable and Nonbillable Event Check Line Items

Before you post the event check, you can view all line items associated with the check, including both billable and nonbillable line items. You can view these items in the Line Items view tab for the event check. The total amount of the event check, taxes, and service charges values are only affected by the billable items and not by the nonbillable items.

All simple products are shown in the Line Items view. For complex products, the Billable flag is disabled for child products and is enabled for the main products. If the Billable flag is unchecked and the event check is refreshed, the complex product will not appear in the Line Items (Guest) view.

This task is a step in Process of Generating Event Checks on page 450.

To view billable and nonbillable event check line items

1. Navigate to the Event Checks screen > Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check # field, and then click the Line Items view tab.
4. In the Line Items list, select a line item and examine the Billable field.

   This Billable flag will be checked for billable line items.

Posting Event Checks

After event order updates are completed, the event manager posts the event check for an individual order or posts the event checks for all orders on a specified day.

Posting the event check calculates the event check total (including taxes and service charges) for the order, and includes the final total in the event check. During this process, the Event Checks screen's Line Items (Guest) view appears, allowing the user to verify that the required taxes and service charges are included in the calculation. After the process is completed, the order status is automatically set to Closed and the Status field in the event check record is automatically set to Posted. At this point, the event check is finalized and can no longer be updated.

This task is a step in Process of Generating Event Checks on page 450.

To post an individual event check

1. Navigate to the Event Check screen > Event Checks List view.
2. In the Event Checks list, query for and select the required event order.
3. Scroll down to the Event Check form, and click Post Check.

   The Line Items (Guest) view for the event check is displayed so that you can check the taxes and service charges. The order status is automatically set to Closed and the Status field in the event check record is automatically set to Posted. The event check is finalized.

To post all event checks for a day

1. Navigate to the Events screen > Event Checks List view.
2. In the Event Checks list, query for and select the required event order.
3. Click Post Day.

   A dialog box appears showing the current date.

4 In the dialog box, change the date to the required date, and then click Post Checks.

Each order that has a function on the specified date is posted. The order status is automatically set to Closed and the Status field in each event check record is automatically set to Posted. Each event check is finalized.

NOTE: If there are no orders associated with the specified date, the user is informed of this, and therefore cannot post any checks for that date.

Related Topic

- Guest and Accounting Event Check Rules and Review on page 456

Guest and Accounting Event Check Rules and Review

Operations managers can review event checks that are generated for the customer and for the property's accounting department using the Event Checks screen.

Oracle's Siebel Hospitality uses a set of rules when generating and displaying the final Guest Event Check and Accounting Event Check. These rules depend on a number of factors, which include the Product Type, Parent Product Type, and any Tax and Service Charge inclusions specified for the order function line items.

There are two types of products, simple and complex. *Simple products* are stand-alone products that do not have associations with parent or child product records. For example, a simple product might be a projector required for a meeting function. *Complex products* are associated with either parent or child records (and in some cases, complex products are associated with both). Examples of complex products are menus and packages. For more information on menus and packages, see Chapter 20, "Managing Property-Specific Menus and Packages."

Based on the set of rules, the application validates the product type to determine how to calculate and display the function line items on each Event Check type. The Tax and Service Charge inclusions are then applied to calculate each function line item price.

For example, when an Event Check (or a Trial Check) is posted for simple function line items that are tax and service charge inclusive, the Guest Event Check shows the total amount paid by the customer. If an item is $100 and it is flagged tax and service charge inclusive, the customer sees only $100 on the check. The Guest Event Check displays the Original Total Price for that line item.

The Accounting Event Check, however, shows the pre-tax and service charge deduction price. For the $100 item, assuming the Tax and Service Charge flags are checked, the product's price is shown as $82, and on separate lines in the event check, an $8 tax and a $10 service charge are listed for a total of $100. The Account Event Check displays an Adjusted Total Price for that line item.

Related Topics

- Process of Generating Event Checks on page 450
- Calculation Rules for Generating and Displaying Event Checks on page 457
- Reviewing Event Checks on page 462

Calculation Rules for Generating and Displaying Event Checks

The tables in this section describe the rules used to determine the method of calculation performed on the Guest Event Check and Accounting Event Check. The rules are:

- Rules for Simple and Generic Products. See Table 84 on page 458.
- Rules for Parent Products with Child Records. See Table 85 on page 458.
- Rules for Mid-Tier Products with Parent and Child Records. See Table 86 on page 460.

- Rules for Child Products Without Associated Child Products. See Table 87 on page 461.

Table 84. Rules for Simple and Generic Products

Criteria	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The function line item is a Generic product or a Simple product.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Accounting: Item A = $80 Item A Tax = $20 Item A Total = $100

Table 85. Rules for Parent Products with Child Records

Criteria	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The function line item is a Package Per Person.	Original Total Price	$0	Guest: Item A = $100 Accounting: Item A = $0
The function line item is a Package Each.	Original Total Price	$0	Guest: Item A = $100 Accounting: Item A = $0
The function line item is a Package Item Price.	Not Displayed	$0	Guest: Item A = n/a Accounting: Item A = $0

Table 85. Rules for Parent Products with Child Records

Criteria	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The function line item is a Menu Per Person without Split Items.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Accounting: Item A = $80 Item A Tax = $20 Item A Total = $100
The function line item is a Menu Per Person with Split Items.	Not Displayed	Not Displayed	Guest: Item A = n/a Accounting: Item A = n/a

Table 86. Rules for Mid-Tier Products with Parent and Child Records

Criteria	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The function line item is a Menu Per Person without split items and the parent is a Package Per Person.	Not Displayed	Total Adjusted Allocation	Guest: Item A = n/a Accounting: Item A = $80 Item A Tax = $20 Item A Total = $100
The function line item is a Menu Per Person with split items and the parent is a Package Per Person.	Not Displayed	Not Displayed	Guest: Item A = n/a Accounting: Item A = n/a
The function line item is a Package Per Person and the parent is a Package Per Person.	Not Displayed	$0	Guest: Item A = n/a Accounting: Item A = $0
The function line item is a Package Per Person and the parent is a Package Item Price.	Original Total Price	$0	Guest: Item A = $100 Accounting: Item A = $0
The function line item is a Package Each and the parent is a Package Item Price.	Original Total Price	$0	Guest: Item A = $100 Accounting: Item A = $0
The function line item is a Package Each and the parent is a Package Per Person.	Not Displayed	$0	Guest: Item A = n/a Accounting: Item A = $0

Table 86. Rules for Mid-Tier Products with Parent and Child Records

Criteria	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The function line item is a Package Item Price and the parent is a Package Each/Package Per Person.	Not Displayed	$0	Guest: Item A = n/a Accounting: Item A = $0
The function line item is a Menu Per Person without split items and the parent is a Package Item Price.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Accounting: Item A = $80 Item A Tax = $20 Item A Total = $100

Table 87. Rules for Child Products Without Children

Criteria	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The parent function line item is a Menu Per Person without Split Items.	Not Displayed	Not Displayed	Guest: Item A = n/a Accounting: Item A = n/a
The parent function line item is a Menu Per Person with Split Items and the function line item is not a Split Item.	Not Displayed	Not Displayed	Guest: Item A = n/a Accounting: Item A = n/a

Table 87. Rules for Child Products Without Children

Criteria	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The parent function line item is a Menu Per Person with Split Items and the function line item is a Split Item.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Accounting: Item A = $80 Item A Tax = $20 Item A Total = $100
The parent function line item is a Package Per Person.	Not Displayed	Total Adjusted Allocation	Guest: Item A = n/a Accounting: Item A = $80 Item A Tax = $20 Item A Total = $100
The parent function line item is a Package Each.	Not Displayed	Total Adjusted Allocation	Guest: Item A = n/a Accounting: Item A = $80 Item A Tax = $20 Item A Total = $100
The parent function line item is a Package Item Price.	Original Total Price	Total Adjusted Allocation	Guest: Item A = $100 Accounting: Item A = $80 Item A Tax = $20 Item A Total = $100

Reviewing Event Checks

Event Managers can review event checks that are generated for the customer and for the property's accounting department using the Event Checks screen. The event manager reviews the individual event check line items and verifies items that have Tax and Service Charge inclusive flags checked.

Use the Visibility filter to show All Event Checks, or All Event Checks Across Organizations.

This task is a step in Process of Generating Event Checks on page 450.

To review event checks

1. Navigate to the Event Checks screen > Event Checks List view.
2. In the Event Checks list, query for and select the required event check record.
3. In the Event Check record, click the link in the Event Check # field.
4. From the Event Check form, click the Line Items (Guest) view tab to review customer invoice items.
5. Click the Line Items (Accounting) view tab to review event check line items for accounting.
6. Click the Notes view tab to review other information entered about the event.

Voiding an Event Check

Posted event checks can no longer be updated. Therefore, if the manager finds a problem with an event check during a review, then the manager must void the original event check and post an updated version.

When the event manager sets the event check status to Void, the Order screen's Function Line Items view appears with a new version of the event check. The copy of the voided event check has a new Event Check number and can be edited. The status of the order is updated from Closed to Open, and the Event Check # field reflects the new invoice number.

This task is a step in Process of Generating Event Checks on page 450.

To void a posted event check

1. Navigate to the Event Checks screen > Event Checks List view.
2. In the Event Checks list, query for and select the required event check record.
3. In the Event Check record, change the value in the Status field to Voided, and then save the record.

   The Order screen > Function Line Items view appears.
4. Update the new event check record.
5. Post the event check.
6. For more information on posting an event check, see Posting Event Checks on page 455.

Event Check Reports and Printouts

Event managers and operations personnel can generate reports and print guest and accounting event checks. For more information, see Chapter 28, "Creating Hospitality Reports."

28 Creating Hospitality Reports

This chapter describes the various reports in the Hospitality application and the administrator and end-user procedures necessary to generate them. It includes the following topics:

- Process of Administering Hospitality Reports on page 465
- Configuring Reports on page 465
- Process of Generating Hospitality Reports on page 471
- About the Banquet Event Order (BEO) Report on page 469
- About the Schedule of Events (SOE) Report on page 476
- About the Banquet Revenue Summary Report on page 479
- About the Quote Summary Report on page 482
- About the Guest Event Check Report on page 484
- About the Accounting Event Check Report on page 487
- About the Function Space Products Report on page 489
- About the Function Space Setup Style Report on page 493
- About the Diary Report on page 495
- About the FSI New Bookings Report on page 501

Process of Administering Hospitality Reports

This topic lists the tasks typically performed by administrators when setting up reports. Your company may follow a different process according to its business requirements.

To set up hospitality reports, perform the following procedures:

1. Configuring BEO and SOE Report Headers on page 466
2. Adding Report Logos to Properties on page 468
3. Configuring Banquet Revenue Summary Report Headers on page 468

Configuring Reports

Before reports are generated by the users, it is important that you configure the reports so that the appropriate report headers are included to display line items and property-specific information in the reports. Report logos should also be added to the property records if required for the generated reports.

Configuring BEO and SOE Report Headers

As the administrator, you can add global report headers to the system and then associate them with different properties and products so that they are displayed when BEO and SOE reports are generated. Line items for these reports are categorized under different report headers and if these report headers are not configured, the line items will be displayed in the reports.

To configure the report headers for BEO and SEO reports, perform the steps in the following procedures.

This task is a step in Process of Administering Hospitality Reports on page 465.

To create a global report header

1. Navigate to the Report Headers screen.
2. In the Report Headers list, create a new record, and save your information.

   It is now possible to associate this global report header with individual properties and products.

To associate a report header with a product

1. Navigate to the Administration - Product screen > Products list view.
2. Query for the product with which you want to associate the report header.
3. In the Report Header field, click the select button, and then select the report header.
4. Step off the record to save the information.

To set up a property-specific report header

1. Navigate to the Property Administration screen > Properties list view.
2. Query for the property to which you want to add the report header.

   You can add a subset of the global headers to make them available for the selected property.
3. Drill down on the Property Name hyperlink.
4. Click the Report Headers view tab to navigate to that view.

5 In the Report Headers list, create a new record.

Some of the fields are described in the following table.

Field	Comments
Report Header	This value is selected from the report headers added in the Report Headers screen.
Label	The name of the report header as it appears in the generated report. Using this field, you can add your own customized labels for the global report headers.
BEO Sequence	The sequence in which the report header appears in the BEO report. For example, if 1 is entered as the value, the report header appears as the first header in the generated report.
SOE Sequence	The sequence in which the report header appears in the SOE report.
Display in SOE	When this check box is selected, the report header appears in SOE reports when they are generated.

Comments can now be added to the report header if required.

To create comments for a property-specific report header

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, query for the property.

3 Drill down on the Property Name hyperlink.

4 Select the Report Headers view tab to navigate to that view.

5 In the Report Headers list, query for the record to which you want to add the comment.

6 Scroll down to the Comments list.

7 Create a new record, and add the comment and a brief description.

8 In the sequence field, add a number to indicate the sequence in which the comment should be displayed in the BEO or SOE report.

9 (Optional) Click the Check Spelling button if you want to check the comment text for spelling errors.

To display report headers in the SOE Report

1 Navigate to the Property Administration screen > Properties list view.

2 Query for the property to which you are adding the report header.

3 Drill down on the Property Name hyperlink.

4 Click the Report Headers view tab to navigate to that view.

5 In the Report Headers list, select an existing record or create a new record and complete the fields.

6 Select the Display in SOE check box for each of the report headers that should be displayed on the SOE report and save your changes.

Related Topics

- About the Banquet Event Order (BEO) Report on page 469
- About the Schedule of Events (SOE) Report on page 476

Adding Report Logos to Properties

You can add a logo for each property so that when BEO reports are generated, the logo appears at the top of the page.

This task is a step in Process of Administering Hospitality Reports on page 465.

To add a report logo

1 Navigate to the Property Administration screen > Properties list view.

2 In the Properties list, select the property for which you are generating reports.

3 Locate the Report Logo field, and then click the select button.

4 In the dialog box that appears, query for the appropriate URL.

5 (Optional) If you want to add a new URL, click New in the dialog box and complete the fields.

6 Click OK.

When a new BEO report is generated for the current property, the selected logo is displayed at the top of the page.

Related Topics

- About the Banquet Event Order (BEO) Report on page 469
- Configuring BEO and SOE Report Headers on page 466
- Generating and Printing a BEO Report on page 472

Configuring Banquet Revenue Summary Report Headers

Before revenue items can be displayed in the Banquet Revenue Summary report, they must be configured in the Revenue Category Administration screen.

To configure the report headers for the Banquet Revenue Summary report, perform the steps in the following procedures.

This task is a step in Process of Administering Hospitality Reports on page 465.

To display revenue parent categories in the Banquet Revenue Summary report

1. Navigate to the Revenue Category Administration screen.
2. In the Revenue Parent Category list, query for the category that should be included in the report.
3. Select the BRS Report Flag check box for the record.

   After the flag is selected, all the revenue related to that category is calculated and appears on the report.

NOTE: A maximum of 15 report headers can be selected for display in the Banquet Revenue Summary report.

To display revenue child categories in the Banquet Revenue Summary report

1. Navigate to the Revenue Category Administration screen.
2. In the Revenue Parent Category list, query for the parent category.
3. Select the Revenue Categories view tab.

   The revenue child categories that are associated with the selected revenue parent category are displayed.
4. Select the BRS Report Flag check box for the appropriate child records.

   After the flag is selected, all the revenue related to that category is calculated and appears on the report.

To check the revenue category or revenue parent category for a product

1. Navigate to the Administration - Product screen > Products list view.
2. Query for the product that you want to check.
3. Examine the value in the Revenue Parent Category and Revenue Sub Category fields.

NOTE: If a line item is included in an event check, then select the BRS Report Flag field (on the Revenue Category Administration screen) for either the revenue category or revenue parent category to show their calculated revenue values in the Banquet Revenue Summary report.

Related Topics

- About the Banquet Revenue Summary Report on page 479
- Generating and Printing a Banquet Revenue Summary Report on page 480

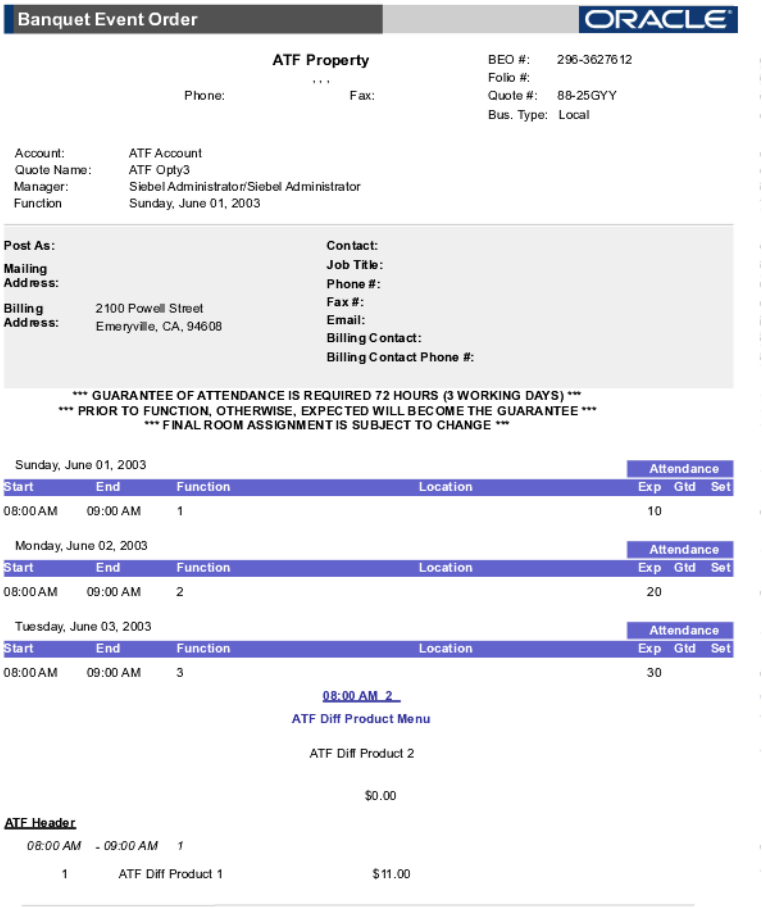
About the Banquet Event Order (BEO) Report

Event managers generate and print a Banquet Event Order (BEO) report before an event occurs. This report provides the operation execution team with detailed information about food, beverages, and setup requirements for all functions covered by a single order.

As shown in Figure 14, the report consists of several sections that provide a summary of the property, account, contact, order, function, and function line item details for the event. The information helps the event execution team manage the event.

The top section of the report provides administrative information about the property, the account, the event contact, and event order details.

When notes are created and associated with the order, the notes are displayed beneath the top section. If there are multiple order notes, the notes are sorted by Sequence #. The list includes both internal (private) and external (public) notes.



Banquet Event Order — ORACLE

ATF Property
, , ,
Phone: Fax:

BEO #: 296-3627612
Folio #:
Quote #: 88-25GYY
Bus. Type: Local

Account: ATF Account
Quote Name: ATF Opty3
Manager: Siebel Administrator/Siebel Administrator
Function Sunday, June 01, 2003

Post As:
Mailing Address:
Billing Address: 2100 Powell Street, Emeryville, CA, 94608

Contact:
Job Title:
Phone #:
Fax #:
Email:
Billing Contact:
Billing Contact Phone #:

*** GUARANTEE OF ATTENDANCE IS REQUIRED 72 HOURS (3 WORKING DAYS) ***
*** PRIOR TO FUNCTION, OTHERWISE, EXPECTED WILL BECOME THE GUARANTEE ***
*** FINAL ROOM ASSIGNMENT IS SUBJECT TO CHANGE ***

Sunday, June 01, 2003

Start	End	Function	Location	Attendance Exp	Gtd	Set
08:00 AM	09:00 AM	1		10		

Monday, June 02, 2003

Start	End	Function	Location	Attendance Exp	Gtd	Set
08:00 AM	09:00 AM	2		20		

Tuesday, June 03, 2003

Start	End	Function	Location	Attendance Exp	Gtd	Set
08:00 AM	09:00 AM	3		30		

08:00 AM 2
ATF Diff Product Menu
ATF Diff Product 2
$0.00

ATF Header
08:00 AM - 09:00 AM 1
1 ATF Diff Product 1 $11.00

Figure 14. Sample BEO Report

The main purpose of the BEO report is to communicate the list of functions as well as any associated function line items. The report's line items are displayed according to predefined rules:

- Functions are listed by Date and then by Start Time.
- Canceled functions are not displayed on the report.
- Function Line items associated with a particular function are listed by Service Start Time.

- Function Line Items that are type Menu appear as the first group under a function.
- The report headers that are configured using the procedures in Configuring Reports on page 465 are printed in this report if they contain line items or comments.

Related Topics

- Configuring BEO and SOE Report Headers on page 466
- Adding Report Logos to Properties on page 468
- Reviewing and Adding Specifications for the BEO Report on page 471
- Generating and Printing a BEO Report on page 472
- BEO Report Fields on page 473

Process of Generating Hospitality Reports

This topic lists the tasks typically performed by event managers and operations managers when generating reports. Your company may follow a different process according to its business requirements.

To generate hospitality reports for an event, perform the following procedures:

1. Reviewing and Adding Specifications for the BEO Report on page 471
2. Generating and Printing a BEO Report on page 472
3. Validating the Print Line in SOE Flag on page 477
4. Generating and Printing an SOE Report on page 478
5. Generating and Printing a Banquet Revenue Summary Report on page 480
6. Generating and Printing the Quote Summary Report on page 484
7. Generating and Printing the Guest Event Check Report on page 486
8. Generating and Printing the Accounting Event Check Report on page 489
9. Generating and Printing a Function Space Products Report on page 490
10. Generating and Printing a Function Space Setup Style Report on page 494
11. Generating and Printing a Diary Report on page 497
12. Generating and Printing an FSI New Bookings Report on page 503

Reviewing and Adding Specifications for the BEO Report

Users can use the Orders screen > Event Order > BEO Specifications view to both review and add specifications to the BEO report before generating it.

The BEO Specifications view consists of the Report Headers list, the Line Items list, and the Comments list. This view shows all the report headers that are associated with the products selected for the event order. Report headers with no child line items also appear in the Report Headers list. However, when the report is generated, only report headers with either line items or comments are displayed. Report headers that are listed in the Report Headers list but which have no child line items or comments do not appear in the report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To review product line items associated with a report header

1. Navigate to the Order screen > Event Order list view.
2. In the Event Orders list, query for the order.
3. Drill down on the Order # hyperlink.
4. Click the BEO Specifications view tab to navigate to that view.
5. Query for the report header.
6. Scroll down to the Line Items list to check the line items associated with the order and report header.

To add property-specific comments to a report header

1. Navigate to the Orders screen > Event Order list view.
2. In the Event Orders list, query for the order.
3. Drill down on the Order # hyperlink.
4. Click the BEO Specifications view tab to navigate to that view.
5. Query for the report header.
6. Scroll down to the Comments list, and create a new record.
7. In the Comments field, click the select button to choose a comment.

   The Sequence field is automatically populated after you have chosen the comment.

   The comments that are available for selection are those property-specific comments added in the Property Administration screen > Reports Headers view. New comments for the report header can also be added using the BEO Specifications view.

Generating and Printing a BEO Report

End users complete the steps in the following procedure to generate and print a BEO Report for a Hospitality event.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print a BEO report

1. Navigate to the Order screen > Event Orders List view.
2. In the Event Orders list, query for the order.
3. Select the order, and from the toolbar, click the Reports button.

   NOTE: The Banquet Event Order report can be generated from each of the view tabs shown on the Event Orders view, for example, the BEO Specifications view and the Notes view.

4. In the Select a Report menu, click Banquet Event Order.
5. When the BEO Specifications dialog box appears:
   - Select the Print Function Space check box if function spaces should be included in the report when it is generated.
   - Clear this check box if function spaces should not be included in the report.
6. Click Finish.

   The BEO report is generated in a Siebel Report Viewer window.

7. Click the Print Setup button to display a standard Windows print dialog box.
8. Choose appropriate printer settings, and then click OK.

Related Topics

- Configuring BEO and SOE Report Headers on page 466
- Adding Report Logos to Properties on page 468
- Reviewing and Adding Specifications for the BEO Report on page 471
- BEO Report Fields on page 473

BEO Report Fields

Table 88 lists the fields that can be printed in the BEO report.

Table 88. BEO Report Fields

Field	Comments	Source
Property Logo	The logo for the quote property.	Property Administration > Report Logo
Property	The name of the property at which the event is being held.	Quotes > Property
Property Address	The address of the quote property.	Quotes > Property Address
Property Phone Number	The main phone number for the property.	Quotes > Property Phone

Table 88. BEO Report Fields

Field	Comments	Source
Property Fax Number	The main fax number for the property.	Quotes > Property Fax
Property URL	The main URL for the property.	Quotes > Property URL
Order #	The order number for the event.	Orders
Quote #	The quote number for the event.	Quotes
Business Type	The opportunity business type. This value can be either Group or Local.	Opportunities
Folio #	The folio number for the quote.	Quotes > Folio Number
Function Day/Date	The date on which the event is due to take place.	Quotes
Quote Name	The name of the quote for the event.	Quotes
Post As Name	The name of the event. This value can be the same as the name of the quote.	Quotes > Post As
Billing Address	The billing address for the quote.	Quotes > Billing Address
Contact	The event contact for the event. If the event contact is not supplied, this value defaults to the contract contact.	Quotes > Contact
Job Title	The title of the event contract contact.	Quotes > Job Title
Phone #	The phone number of the event or contract contact.	Quotes > Contact Phone #
Fax #	The fax number of the event or contract contact.	Quotes > Contact Fax #
Email Address	The email address for the event or contract contact.	Quotes > Contact Email Address
Billing Contact	The name of the billing contact. This field is only printed in the report if there is a billing contact specified in the system.	Quotes > Billing Contact Name

Table 88. BEO Report Fields

Field	Comments	Source
Billing Contact Phone #	The phone number of the billing contact. This field is only printed in the report if there is a billing contact specified in the system.	Quotes > Billing Contact Address
Quote Managers	The sales, event, or catering managers that are assigned to the quote.	Quotes > Event Manager/Sales Manager
Date Printed	The date on which the BEO report was printed.	System
Guarantee/Room assignment clause	The property-defined statement that contains information about the guarantee and when it is due, and stating that room assignments are subject to change.	Set clause
Start/End Time	The start and end time of each function and subfunction in the event.	Quotes > Function Agenda
Function Type	The type of function in the event.	Quotes > Function Agenda
Function/Subfunction Post As	The unique name that may be given to a function or subfunction.	Quotes > Function Agenda
Location	The location in which the event is scheduled to take place.	Quotes > Function Agenda
Attendance	Number of people that are expected to attend the event.	Quotes > Function Agenda
Report Headers	The various report headers that are configured using the procedures outlined in Configuring Reports on page 465. Any products that are neither food nor beverages are printed under these headers.	Administration - Product
If In Agreement Clause	Statement that appears at the end of the report under the signature line.	Set clause

About the Schedule of Events (SOE) Report

Event managers generate and print a Schedule of Events (SOE) report before an event occurs. This report contains the list of functions and function line items that make up an event. The SOE report is an abbreviated version of the BEO report. However, it does provides a complete overview of functions and function line items required for an event.

The report has several sections that provide a summary of the property, order, and function details for the event.

The top section provides general information regarding the property and high-level quote details. The information is displayed for administrative purposes.

As shown in Figure 15, the Function records are listed beneath the administrative section. Essential function details listed include the Date of the Function, Start Time, End Time, Function Space, Setup Style, Function Type, Function Name, and Expected Number of Attendees.

Schedule of Events ORACLE

ATF Property
ATF Opportunity

Phone: Fax:
Post As:
Manager: Siebel Administrator/Siebel Administrator

Quote #:	88-28UXO	Contact Name:	
Quote Name:	ATF Opportunity	Contact Address:	
Business Type:	Local	Contact City:	
# of Nights:	3	Phone:	Fax:

Sunday, June 01, 2003

08:00 AM - 09:00 AM	Breakfast	
	BEO# 296-3778386	10 guests

**** END OF SUNDAY ****

Monday, June 02, 2003

08:00 AM - 09:00 AM	Breakfast	
	BEO# 296-3778386	20 guests

**** END OF MONDAY ****

Tuesday, June 03, 2003

08:00 AM - 09:00 AM	Breakfast	
	BEO# 296-3778386	30 guests

**** END OF TUESDAY ****

Figure 15. Sample SOE Report

The purpose of the SOE report is to communicate the list of functions as well as any associated function line items.

A set of rules determines how the report line items are displayed:

- Functions are listed by Date and then by Start Time.
- Subfunctions appear in italics.
- Canceled functions do not appear in the report.
- The Print Line in SOE check box (flag) in the Function Line Item record must be selected for the line item to appear in the report.
- The Print Line in SOE flag is inherited from the Category record. If the Print Line SOE check box (flag) is selected in the Category record, then the Print Line In SOE flag for each Function Line Item associated with the category is selected by default.
- Function Line Items associated with a particular function are listed by Type, and then by Service Start Time.

For more information on any of the fields used in the SOE report, see BEO Report Fields on page 473.

NOTE: Both the report header and the line items associated with it should be selected to display both if these in the report.

Related Topics

- Configuring BEO and SOE Report Headers on page 466
- About the Banquet Event Order (BEO) Report on page 469
- Validating the Print Line in SOE Flag on page 477
- Generating and Printing an SOE Report on page 478

Validating the Print Line in SOE Flag

Before generating reports, end users should perform the steps in the following procedure to verify that the required function line items are flagged, allowing the line item to appear in the SOE report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To validate the Print Line in SOE

1. Navigate to the Functions screen > Function List view.
2. In the Functions list, query for the function.
3. Drill down on the Function Name hyperlink.
4. From the Line Items list, scroll down to the More Info view.
5. In the More Info view, locate the Print Line in SOE check box, and verify that the check box is selected.

- If the check box is selected, the line item appears on the SOE report.
- If the check box is not selected, the line item is not displayed on the report.

NOTE: You may need to click the show more button to expose this check box on the form.

Generating and Printing an SOE Report

Perform the steps in the following procedure to generate and print an SOE report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print the SOE report

1. Navigate to the Quotes screen > Quotes list view.
2. From the toolbar, click the Reports button.
3. In the Select a Report menu, click Schedule Of Events.

   The following table describes some of the fields in the SOE Report Parameters dialog box.

Field	Comments
Quote Name	The name of the quote for which the report is being generated.
Function Space	The name of the function space for which the report is being generated.
Date	The date for which the report is being generated. Any functions due to take place on this date are printed in the report.
Print Line Items in SOE	Selecting this check box indicates that line items should be included in the report.

4. In the SOE Report Parameters dialog box, specify the appropriate report parameters and click Finish.

   The SOE report is generated in a Siebel Report Viewer window.
5. Click the Print Setup button to display a standard Windows print dialog box.
6. Choose appropriate printer settings, and then click OK.

Related Topics

- About the Schedule of Events (SOE) Report on page 476
- Configuring Banquet Revenue Summary Report Headers on page 468
- Validating the Print Line in SOE Flag on page 477

About the Banquet Revenue Summary Report

The Banquet Revenue Summary report summarizes local, group, and void quote revenue. Each quote is further broken down by event check. Each quote is printed on a single page in the report and all revenue for each quote is divided by revenue category (audiovisual, beer, breakfast, and so on). The last page of the report contains a summary of the revenue divided by booking type, with a single row for group, local, and void, with an additional row called Grand Total, which summarizes all revenue.

The final page of the report also includes a section that provides a summary by parent function type. Revenue is broken down by parent function type rather than revenue category. This section evaluates only group and local quote revenues. Covers for each parent function type are included.

Event managers use this report to:

- Verify that all catering revenue was posted to the appropriate revenue type and parent function type
- Determine if the revenue was credited appropriately to group or local

The Banquet Revenue Summary report (Figure 16) is typically run at the end of each day after all the event checks have been verified, signed, and posted.

BRS Report

ORACLE

Gross Totals

	AV-PS	Food-PS	Function Space Rental-PS	Sleeping Room Rental-PS	Anu	Audio	Coffee-PS	Coffee	Dinner-PS	Drink	Lunch-PS	Visual	Visual-PS	Taxes	Total Check
Group Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Totals	0	0	0	0	0	0	0	0	0	0	125	125	0	0	125
Grand Totals	0	0	0	0	0	0	0	0	0	0	125	125	0	0	125

Adjusted Totals

	AV-PS	Food-PS	Function Space Rental-PS	Sleeping Room Rental-PS	Anu	Audio	Coffee-PS	Coffee	Dinner-PS	Drink	Lunch-PS	Visual	Visual-PS	Taxes	Total Check
Group Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Grand Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

NET TOTALS

	AV-PS	Food-PS	Function Space Rental-PS	Sleeping Room Rental-PS	Anu	Audio	Coffee-PS	Coffee	Dinner-PS	Drink	Lunch-PS	Visual	Visual-PS	Taxes	Total Check
Group Totals	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Totals	0	0	0	0	0	0	0	0	0	0	125	125	0	0	125
Grand Totals	0	0	0	0	0	0	0	0	0	0	125	125	0	0	125

Figure 16. Sample Banquet Revenue Summary Report (Gross, Adjusted, and Net Totals)

Related Topics

- Configuring Banquet Revenue Summary Report Headers on page 468
- Generating and Printing a Banquet Revenue Summary Report on page 480
- Banquet Revenue Summary Report Fields on page 481

Generating and Printing a Banquet Revenue Summary Report

Perform the steps in the following procedure to generate and print a Banquet Revenue Summary report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print a Banquet Revenue Summary report

1. Navigate to the Event Checks screen > Event Checks list view.
2. In the Event Checks list, query for the event check record.
3. In the Event Check record, click the link in the Event Check # field.

   The Event Check Line Items view appears.
4. Click the Line Items (Accounting) or the Line Items (Guest) view tab.
5. From the toolbar, click the Reports button.
6. In the Select a Report menu, click Banquet Revenue Summary.

   The Banquet Revenue Summary report is generated in a Siebel Report Viewer window.
7. Click the Print Setup button to display a standard Windows print dialog box.
8. In the print dialog, choose appropriate printer settings, and then click OK.

Related Topics

- Configuring Banquet Revenue Summary Report Headers on page 468
- Banquet Revenue Summary Report Fields on page 481

Banquet Revenue Summary Report Fields

Table 89 lists the fields used in the Banquet Revenue Summary report. The report headers displayed in the report depend on the products defined for the property and whether or not the BRS Report Flag is selected (see Configuring Banquet Revenue Summary Report Headers on page 468).

Table 89. Banquet Revenue Summary Report Fields

Field	Comments	Source
Booking	The value of this report header which is Group Bookings, Local Bookings or Void Checks, depending on the report page.	Not applicable
Quote Name	The name of the quote for which the report is generated.	Quotes
Quote Manager	The sales, event, or catering managers who are assigned to the quote.	Quotes > Event Manager/Sales Manager
Event Check Number	The number of the event check for which the report is generated.	Event Checks
Folio Number	The folio number for the quote.	Quotes > Folio Number
Report Headers **NOTE:** A maximum of 15 revenue categories can be selected for display in the Banquet Revenue Summary report.	The various report headers that are configured using the procedures outlined in Configuring Banquet Revenue Summary Report Headers on page 468. For example, the BRS flag is selected for an Audiovisual revenue category. Under the Audiovisual report header, the report displays the revenue rollup of the line items mapped to the food category off the event check.	Revenue Category Administration
Taxes/SvcChag	Revenue rollup of the taxes and service charges charged on the line items that have taxes or service charges associated with them.	Calculated field
Total Check	Total of the revenue.	Calculated field

Table 89. Banquet Revenue Summary Report Fields

Field	Comments	Source
Gross Totals	Gross revenue totals from event checks divided into Group, Local, and Grand Totals.	Calculated field
Adjusted Totals	Totals from event checks that are voided, divided into Group, Local, and Grand Totals.	Calculated field
Net Totals	Gross Total minus the Adjusted Total). A value is shown for Group, Local, and Grand Totals.	Calculated field
Parent Function Type	Names of the parent function types.	Calculated field
Function Covers	Rollup of the number of covers (people) that are associated with each parent function type. This field is shown for Group, Local, and Total.	Calculated field
Sales	Rollup of the revenue that is made for each parent function type. This field is shown for Group, Local, and Total.	Calculated field
AvgCheck	Rollup of the average check for each parent function type. This field is shown for Group, Local, and Total.	Calculated field

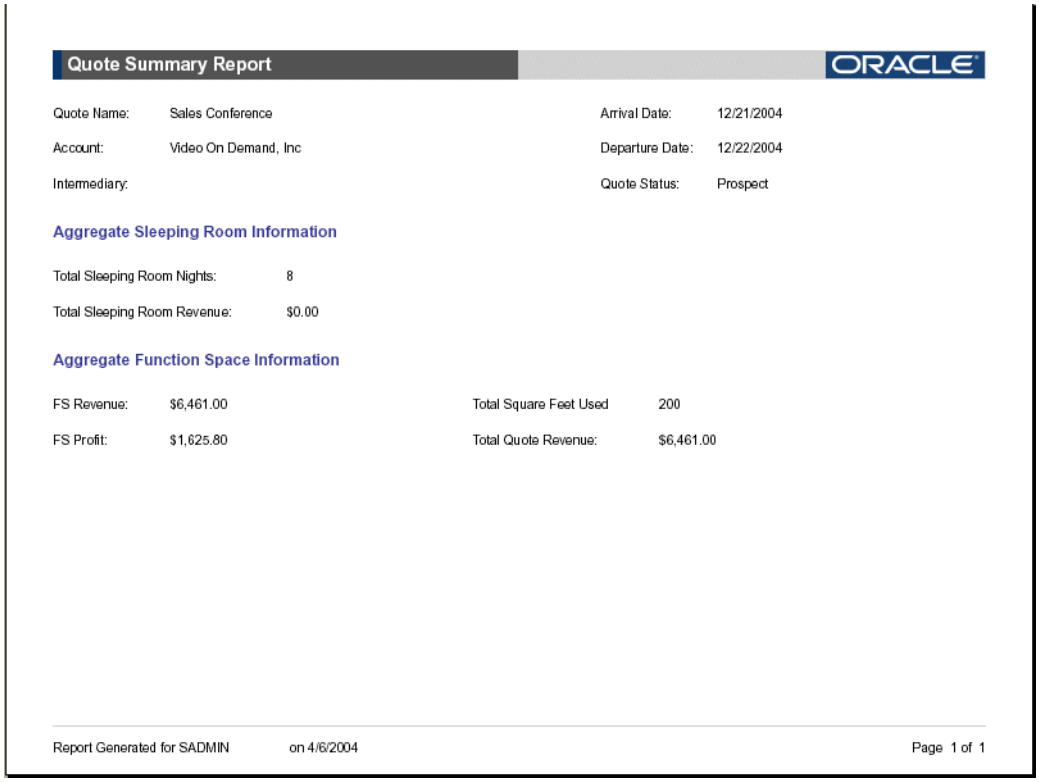
About the Quote Summary Report

Event managers generate and print the Quote Summary Report is generated to display aggregated totals for sleeping rooms and functions associated with a quote. The report reflects what appears on the Quote Screen > Summary view and provides a summary of all the calculated totals.

The Quote Summary view allows the user to gauge the profitability, cost, and the revenue totals associated with the quote. For more information, see Chapter 24, “Revenue Management” for more information.

Figure 17 shows a sample Quote Summary report. The top section consists of general administrative information about the quote record.

The last two sections show a breakdown of the calculated totals for sleeping rooms and functions associated with the quote. For sleeping rooms, these calculations include the Total Sleeping Room Nights, and Total Sleeping Room Revenue. The function section includes the calculations for Function Space Revenue (FS Revenue), Function Space Profit (FS Profit), Total Square Feet Used, and Total Quote Revenue.



Quote Summary Report ORACLE

Quote Name:	Sales Conference	Arrival Date:	12/21/2004
Account:	Video On Demand, Inc	Departure Date:	12/22/2004
Intermediary:		Quote Status:	Prospect

Aggregate Sleeping Room Information

Total Sleeping Room Nights:	8
Total Sleeping Room Revenue:	$0.00

Aggregate Function Space Information

FS Revenue:	$6,461.00	Total Square Feet Used	200
FS Profit:	$1,625.80	Total Quote Revenue:	$6,461.00

Report Generated for SADMIN on 4/6/2004 Page 1 of 1

Figure 17. Sample Quote Summary Report

The Quote Summary report allows the user to view the total quote amount calculated based on the line items associated with the quote record. The rules that govern what information appears on the Quote Summary Report include:

- The Total Sleeping Room Nights value is the sum of the contracted sleeping rooms.
- The Total Sleeping Room Revenue value is derived from the Sleeping Room Revenue value in the Quote Summary view.
- The FS Revenue is derived from the Function Space Revenue value in the Quote Summary view.
- The FS Profit is derived from the Function Space Profit value in the Quote Summary view.
- The Total Square Feet Used value is the sum of the function space area designated for the function.
- The Total Quote Revenue value is the sum of the Total Sleeping Room Revenue and FS Revenue.

Related Topics

- Generating and Printing the Quote Summary Report on page 484
- Generating and Printing the Guest Event Check Report on page 486
- Generating and Printing the Accounting Event Check Report on page 489

Generating and Printing the Quote Summary Report

Perform the steps in the following procedure to generate and print a Quote Summary report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print a Quote Summary report

1. Navigate to the Quotes screen > Quotes list view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Quote Name field.
4. Click the Summary view tab.
5. From the toolbar, click the Reports button.
6. In the Select a Report menu, click Quote Summary Report.

   The Quote Summary report is generated in a Siebel Report Viewer window.
7. Click the Print Setup button to display a standard Windows print dialog box.
8. Choose appropriate printer settings, and then click OK.

Related Topic

About the Quote Summary Report on page 482

About the Guest Event Check Report

During the Event Check process, the event manager can create reports based on the Event Check record. During this process, a set of rules are applied to determine how line item details appear in the report. For more information on the display rules, see Chapter 27, “Generating Event Checks.”

The Guest Event Checks report reflects the line item records in the Event Checks Screen > Line Items (Guest) view, which are transformed into the customer’s version of the accounting department’s Event Checks Report. See Guest and Accounting Event Check Rules and Review on page 456 for more information on the differences between the Guest and Accounting Line Item views.

Figure 18 shows a sample Guest Event Check Report. The report consists of sections that provide information about the account and a summary of the event check and its invoiced line items.

The top section provides general administrative information about the account and the event check.

The line item records are listed beneath the administrative section. Detailed information about each line item and its prices includes the Item Name, Unit Price, Total Price, and Discount % or Discount Amounts.

Invoice - Guest Copy ORACLE

Axora Systems
1001 University Ave.
Palo Alto CA 94026
Phone: (650) 853-1927 Fax:(650) 853-1822

Check #: 83602-920826
Status: Trial
Business Type:
Event Manager:
Sales Manager:
Invoice Date: 7/15/2002

Bill Method:
Tax Exempt: N
Exempt Appr: N
BEO #: 83602-920764
Folio #:
Event Name:
Room Name(s):

Quantity	Item	Unit Price	Total Price	
Packages				
	Stuffed Chicken with Pesto Lunch Combo	$25.00	$0.00	
	Seared Pepper Salmon Fillet Lunch Combo	$27.00	$0.00	
	Sauteed Lump Large Crab Cakes Lunch Combo	$28.95	$0.00	
		Subtotal	$0.00	
A/V				
	Projector Carts and Stands	$30.00	$30.00	
	Overhead Projector (11k Lumens)	$245.00	$245.00	
	Microphone, wired	$30.00	$30.00	
	Laser Pointer	$50.00	$50.00	
	8' x 8' Tripod	$35.00	$35.00	
		Subtotal	$390.00	
Beverage				
	Coke	$2.50	$37.50	
	Diet Coke	$2.50	$87.50	
	Assorted Fruit Juices	$2.50	$50.00	
	Coffee - Regular and Decaffeinated	$2.00	$70.00	
	Coffee - Regular and Decaffeinated	$2.00	$80.32	Tax and Svc Chg
		Subtotal	$326.00	

Figure 18. Sample Guest Event Check Report

The records are subtotaled and other fees, including taxes and service charges, are applied to produce the Grand Total for the order. The report is an invoice used to track billing information associated with a particular order.

In addition to the rules used to generate the Event Check line items, another set of rules is applied when generating the Guest Event Checks report from the records listed in the Event Checks record. These rules are:

- Line Items are grouped by Product and then by Category Type.
- Line Items with a $0 amount do not appear in the report.
- Line Items show the applied Tax and Service Charge information at the end of the line.
- Line items show the applied Discount % or Discount Amount at the end of the line.

Related Topics

- Generating and Printing the Guest Event Check Report on page 486
- Generating and Printing the Accounting Event Check Report on page 489

Generating and Printing the Guest Event Check Report

Perform the steps in the following procedure to generate and print a Guest Event Check report.

This task is a step in Process of Administering Hospitality Reports on page 465.

1. Navigate to the Event Checks screen > Event Checks list view.
2. In the Event Checks list, query for the event check record.
3. In the Event Check record, click the link in the Event Check # field.
4. Click the Event Check Line Items (Guest) view tab.
5. From the toolbar, click the Reports button.
6. In the Select a Report menu, click Invoice - Guest.

   The following table describes some of the fields in the Event Check Parameters dialog box.

Field	Comments
Event Check #	The number of the event for which the report is generated. If the user does not enter an event check number in this field, all selected event checks can be included in the report.
Order #	The number of the order for which the report is generated. If the user does not enter an order number in this field, all order numbers can be included in the report.
Quote #	The number of the quote for which the report is generated. If the user does not enter a quote number in this field, all quotes can be included in the report.
Start Date	The start of the invoice date range for the report. Only event checks with invoice dates within this range are included in the report.
End Date	The end of the invoice date range for the report.
Taxes by Header	This check box indicates whether or not the taxes should appear according to their revenue category in the report.
Sub Totals by Header	This check box indicates whether or not the subtotals should appear according to their revenue category in the report.
Print Room Names for Functions	This check box indicates whether or not the primary functions spaces for the functions in the event checks should appear in the report headers.

7. In the Event Check Parameters dialog box, perform the following steps:
   a. Specify some report parameters in the Event Check Parameters section.

b Specify a date range for the invoices in the Date Parameters section.

c Specify any Print Parameters that are required.

d Click Finish.

The Guest Event Checks report is generated in a Siebel Report Viewer window.

8 Click the Print Setup button to display a standard Windows print dialog box.

9 In the print dialog, choose appropriate printer settings, and then click OK.

About the Accounting Event Check Report

The event manager can create a report based on the Event Check record that is used by the property's accounting department. The report reflects the line item records listed in the Event Checks Screen > Line Items (Accounting) view, which are transformed into an accounting version. Different rules are used to calculate the values for each view and this is reflected in the Guest Event Check and Accounting Event Check reports. See Guest and Accounting Event Check Rules and Review on page 456 for more information.The report provides information about the account, a summary of the event check, and the event check's invoiced line items in separate sections. Figure 19 shows a sample Accounting Event Checks Invoice report.

The top section of the report includes general administrative information on the account and the event check.

The line item records are listed beneath the administrative section. Detailed information about the line item and its prices includes Item Name, Unit Price, Total Price, and Discount % or Discount Amounts.

Invoice - Accounting Copy ORACLE

Axora Systems
1001 University Ave.
Palo Alto CA 94026
Phone (650) 853-1927 Fax: (650) 853-1822

Check #: 83602-920826
Status: Trial
Business Type:
Event Manager:
Sales Manager:
Invoice Date: 7/15/2002

Bill Method:
Tax Exempt: N
Exempt Appr: N
Folio #:
BEO #: 83602-920764
Event Name:
Room Name(s):

Quantity	Item	Unit Price	Total Price	
Packages				
	Stuffed Chicken with Pesto Lunch Combo	$25.00	$0.00	
	Seared Pepper Salmon Filet Lunch Combo	$27.00	$0.00	
	Sauteed Lump Large Crab Cakes Lunch Combo	$28.95	$0.00	
		Subtotal	$0.00	
A/V				
	Projector Carts and Stands	$30.00	$30.00	
	Overhead Projector (11k Lumens)	$245.00	$245.00	
	Microphone, wired	$30.00	$30.00	
	Laser Pointer	$50.00	$50.00	
	8' x 8' Tripod	$35.00	$35.00	
		Subtotal	$390.00	
Beverage				
	Coke	$2.50	$37.50	
	Diet Coke	$2.50	$87.50	
	Assorted Fruit Juices	$2.50	$50.00	
	Coffee - Regular and Decaffeinated	$2.00	$70.00	
	Coffee - Regular and Decaffeinated	$2.00	$80.32	Tax and Svc Chg
	Coffee Table	$0.00	$0.00	
		Subtotal	$326.00	

Figure 19. Sample Accounting Event Check Report

The records are subtotaled, and other charges including taxes and service charges are applied to produce the Grand Total for the order. The report is an invoice used to track billing information associated with a particular order.

In addition to the rules used to generate the Event Check line items, another set of rules is applied to generate the Accounting Event Checks Report. The rules are:

- Line Items are grouped by Product and then by Category Type.
- Line Items with a $0 amount do not appear.
- Line Items show the applied Tax and Service Charge information at the end of the line.
- Line items show the applied Discount % or Discount Amount at the end of the line.

Related Topics

- Generating and Printing the Accounting Event Check Report on page 489
- Generating and Printing the Guest Event Check Report on page 486

Generating and Printing the Accounting Event Check Report

Perform the steps in the following procedure to generate and print an Accounting Event Check report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print an Accounting Event Check report

1. Navigate to the Event Checks screen > Event Checks list view.
2. In the Event Checks list, query for the event check record.
3. In the Event Check record, click the link in the Event Check # field.
4. Click the Line Items (Accounting) view tab.
5. From the toolbar, click the Reports button.
6. In the Select a Report menu, click Invoice - Accounting.
7. In the Event Check Parameters dialog box, perform the following steps:
   a. Specify some report parameters in the Event Check Parameters section.
   b. Specify a date range for the invoices in the Date Parameters section.
   c. Specify any Print Parameters that are required.
   d. Click Finish.

   See Generating and Printing the Guest Event Check Report on page 486 for more information on the fields of the Event Check Parameters dialog box.

   The Accounting Event Checks report is generated in a Siebel Report Viewer window.
8. Click the Print Setup button to display a standard Windows print dialog box.
9. Choose appropriate printer settings, and then click OK.

About the Function Space Products Report

The event manager and administrator can use the Function Space Products report to review the component-specific spaces for each function space category for a particular property.

A report page (Figure 20) for each category in the property, together with its associated specific spaces, is generated. The selected property and the date on which the report is being run are displayed at the top of each report. Each category report is then divided into two sections, a category and a specific space section. The category section provides a detailed over of the category itself, while the specific space section lists the details for each specific space associated with the category.

Function Space Product Report ORACLE

Property: Horizon Hotels

Date: 11/16/2004

Function Space Category Name	FSC Max	FSC Physical Area	Property UOM	FSC Description	FSC Back-Up Required	Bypass Fit	Suite	Start Date	End Date
Medium Category		100	Sq. Ft.	Medium Category, Horizon Hotel	N	N	N		

Specific Space	Description	Type	Display Seq.	Usable Area	Physical Area	Property UOM	Floor	Building	Back-up Required	Bypass Fit	Suite	Start Date	End Date
Salon AB	Salon AB, Horizon Hotel	Configured			100	Sq. Ft.			N	N	N		
Salon AC	Salon AC, Horizon Hotel	Configured			100	Sq. Ft.			N	N	N		
Salon BD	Salon BD,Horizon Hotel	Configured			100	Sq. Ft.			N	N	N		
Salon CD	Salon CD, Horizon Hotel	Configured			100	Sq. Ft.			N	N	N		

Figure 20. Sample Function Space Products Report

Related Topics

- Generating and Printing a Function Space Products Report on page 490
- Function Space Product Report Fields on page 491

Generating and Printing a Function Space Products Report

Perform the steps in the following procedure to generate and print a Function Space Products report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print a Function Space Products report

1. Navigate to the Property Administration screen > Category view.
2. From the toolbar, click the Reports button.
3. In the Select a Report menu, click Function Space Products Report.
4. In the dialog box that appears, enter the name of the property for which you want the report, and then click Finish.

   The Function Space Products report is generated in a Siebel Report Viewer window.
5. Scroll through the pages to view the details for each category and its specific spaces.
6. Click the Print Setup button to display a standard Windows print dialog box.

7 Choose appropriate printer settings, and then click OK.

Function Space Product Report Fields

Table 90 lists the fields used in the Function Space Product report's Category section.

Table 90. Function Space Product Report Fields: Category Section

Field	Comments	Source
Function Space Category Name	The function space category defined for the property.	Property Admin > Category
FSC Max	The default maximum value for the category.	Property Admin > Category
FSC Physical Area	The defined physical area for the category.	Property Admin > Category
Property UoM	The Unit of Measure used by the hotel (in square feet or square meters).	Property Admin > Category
FSC Description	The description entered for the category.	Property Admin > Category
FSC Back-Up Required	This field indicates whether backup space is required for the category.	Property Admin > Category
Bypass Fit	This field indicates whether the space is included in the best fit/ next fit availability process.	Property Admin > Category
Suite	This field indicates whether this category is of type suite.	Property Admin > Category
Start Date	The date that the category is available for taking bookings.	Property Admin > Category
End Date	The date that the category is no longer part of the inventory.	Property Admin > Category

Table 91 lists the fields used in the Function Space Product report's Specific Space section.

Table 91. Function Space Product Report Fields: Specific Space Section

Field	Comments	Source
Specific Space	The name of the associated specific space.	Property Admin > Specific Space
Description	The description of the specific space.	Property Admin > Specific Space
Type	Indicates whether the specific space is configured or indivisible.	Property Admin > Specific Space
Display Seq.	The specific spaces's sequence number, used to specify the order of display in the property's Function Space Diary.	Property Admin > Specific Space
Usable Area (sq. ft./sq. meter)	The usable area of the specific space. It may be less than the physical area.	Property Admin > Specific Space
Physical Area	The physical area of the specific space.	Property Admin > Specific Space
Property UoM	The Unit of Measure used by the hotel (in square feet or square meters).	Property Admin > Specific Space
Floor	The floor number where the specific space is located.	Property Admin > Specific Space
Building	The building where the specific space is located in the property.	Property Admin > Specific Space
Back-up Required	This field indicates whether backup space is required for the specific space.	Property Admin > Specific Space
Bypass Fit	This field indicates whether the specific space is included in the best fit/next fit availability process.	Property Admin > Specific Space
Suite	This field indicates whether this specific space is of type suite.	Property Admin > Specific Space

Table 91. Function Space Product Report Fields: Specific Space Section

Field	Comments	Source
Start Date	The date that the specific space is available for taking bookings.	Property Admin > Specific Space
End Date	The date that the specific space is no longer part of the inventory.	Property Admin > Specific Space

About the Function Space Setup Style Report

The event manager can use the Function Space Setup Style Report (Figure 21) to review the setup styles for all function spaces at the selected property.

The name of the selected property, the date on which the report is being run, and the Central Reservations Hotel Code (CRS) for the property are displayed at the top of the report. The report then lists each function space, showing the associated information about the setup style and the space itself, for example, capacity, setup and tear-down times, and so on.

If the function space has more than one setup style associated with it, the function space is listed several times, once for each setup style. For example, Salon A—Theatre; Salon A—Conference; Salon A—Wedding.

Function Space Set-Up Style Report ORACLE

Property: Horizon Hotels
Date: 11/16/2004
CRS Code: 2324

Function Space Category Name	Set-Up Style	Set-Up Style Display Name	Description	Minimum Capacity	Maximum Capacity	Set-Up Time	Tear Down Time	Package	Ceiling Height	Length of Room	Width of Room	Property Unit of Measure
Salon A	Conference			35	75	10	10					Sq. Ft.
Salon A	Wedding			48	88	10	10					Sq. Ft.
Salon A	Theatre			60	100	10	10					Sq. Ft.
Salon AB	Conference			50	150	15	15					Sq. Ft.
Salon AB	Wedding			75	175	15	15					Sq. Ft.
Salon AB	Theatre			100	200	15	15					Sq. Ft.
Salon ABCD	Conference			120	300	20	20					Sq. Ft.
Salon ABCD	Wedding			150	350	20	20					Sq. Ft.
Salon ABCD	Theatre			200	400	20	20					Sq. Ft.
Salon AC	Conference			50	150	15	15					Sq. Ft.
Salon AC	Wedding			75	175	15	15					Sq. Ft.
Salon AC	Theatre			100	200	15	15					Sq. Ft.
Salon B	Conference			35	75	10	10					Sq. Ft.
Salon B	Wedding			48	88	10	10					Sq. Ft.
Salon B	Theatre			60	100	10	10					Sq. Ft.
Salon BD	Conference			50	150	15	15					Sq. Ft.
Salon BD	Wedding			75	175	15	15					Sq. Ft.
Salon BD	Theatre			100	200	15	15					Sq. Ft.
Salon C	Conference			35	75	10	10					Sq. Ft.
Salon C	Wedding			48	88	10	10					Sq. Ft.
Salon C	Theatre			60	100	10	10					Sq. Ft.
Salon CD	Conference			50	150	15	15					Sq. Ft.
Salon CD	Wedding			75	175	15	15					Sq. Ft.
Salon CD	Theatre			100	200	15	15					Sq. Ft.
Salon D	Conference			35	75	10	10					Sq. Ft.
Salon D	Wedding			48	88	10	10					Sq. Ft.
Salon D	Theatre			60	100	10	10					Sq. Ft.

Figure 21. Sample Function Space Setup Style Report

Related Topics

- Generating and Printing a Function Space Setup Style Report on page 494

■ Function Space Setup Style Report Fields on page 494

Generating and Printing a Function Space Setup Style Report

Perform the steps in the following procedure to generate and print a Function Space Setup Style report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print a Function Space Setup Style report

1. Navigate to the Property Administration screen > Specific Space or Category view.
2. Click the Setup Style view tab to navigate to that view.
3. From the toolbar, click the Reports button.
4. In the Select a Report menu, click Function Space Setup Style Report.
5. In the dialog box that appears, enter the name of the property for which you want the report and click Finish.

   The Function Space Setup Style report is generated in a Siebel Report Viewer window.
6. Click the Print Setup button to display a standard Windows print dialog box.
7. Choose appropriate printer settings, and then click OK.

Function Space Setup Style Report Fields

Table 92 lists the fields used in the Function Space Setup Style report.

Table 92. Function Space Setup Style Report Fields

Field	Comments	Source
Function Space Category Name	The name of the function space.	Property Admin > Category
Set-Up Style Name	The name of the setup style.	Property Admin > Category/ Specific Space
Set-Up Style Display Name	The display name for the setup style.	Property Admin > Category/ Specific Space
Description	Description of the setup style.	Property Admin > Category/ Specific Space

Table 92. Function Space Setup Style Report Fields

Field	Comments	Source
Minimum Capacity	The minimum capacity of the function space for this particular setup style.	Property Admin > Category/ Specific Space
Maximum Capacity	The maximum capacity of the function space for this particular setup style.	Property Admin > Category/ Specific Space
Set-Up Time	The time required to set up this particular function space for the setup style.	Property Admin > Category/ Specific Space
Tear-Down Time	The time required to tear down this particular function space category/specific space for this setup style.	Property Admin > Category/ Specific Space
Package	The associated package (complex product).	Property Admin > Category/ Specific Space
Ceiling Height	The ceiling height of the function space.	Property Admin > Category/ Specific Space
Length of Room	The length of the function space.	Property Admin > Category/ Specific Space
Width of Room	The width of the function space.	Property Admin > Category/ Specific Space
Property Unit of Measure	The Unit of Measure used by the hotel (in square feet or square meters).	Property Admin > Specific Space/Admin

About the Diary Report

The event manager, revenue manager, and sales representative can use the Diary report (Figure 22) to make sure space discrepancies are operatively cleared. This promotes revenue and profit maximization through better function space management.

Users can use the Diary report to perform diary audits. A *diary audit* consists of a diary report that is run daily, weekly, and monthly for different spans of time. Daily diary audits should be conducted for a minimum of the coming ten days, weekly diary audits for a minimum of a one-year booking window, and monthly diary audits for booking windows beyond one year, based on the typical booking windows of the property.

This report allows users to generate a report for either or both of the following:

- **Diary Transactions.** This report option identifies when functions have been added, canceled, or moved.

  NOTE: The audit trail on Function Space should be turned on to track transactions.

  Transaction types are:

  - **Add.** This transaction type includes transactions when function spaces are added to the report.
  - **Move.** This transaction type includes transactions when function space is moved to other function space.
  - **Cancel**. This transaction type includes transactions when function spaces are canceled.
- **Diary Exceptions.** This report option identifies where exceptions are occurring within the Diary such as overbookings, attendance levels, status reporting, turn time conflicts, and so on.

Event managers, revenue managers, and sales representatives can use the Diary report to:

- Verify that customer function space requirements are evaluated and adjusted based on the changing requirements of the customer
- Provide accurate assignment of space to meet customer requirements
- Use event staff more efficiently by matching setup styles and minimizing turns between functions
- Provide an accurate picture of remaining inventory availability for future business opportunities
- Return function spaces to the inventory at the earliest possible time and provide an accurate overview of remaining inventory availability for future business opportunities
- Communicate the defined Function Space Sales Strategy for consideration in evaluation of business opportunities
- Permit early identification of potential conflicts (double-bookings, traffic flow, noise, and so on)
- Use rooms and room combinations efficiently to best meet customer requirements while maximizing the available space for additional sales

Diary Report

Function Date	Exception	Function Space	Booking Type	Related Category	Inventory Status	Start Time	End Time	Function Type	Set-Up Style	Exp.	Proj.	Gtd	Set.	FRC. Min	FRC. Max	RRA. Sq.mt.	RRA. Sq.Ft.	UA. Sq.Mt.	UA. Sq.Ft.	Reassign Reason	Quote #	Quote Name	Quote Status	MARSHA Code	SalesMgr1	Sales Mgr2	Event Mgr1	Event Mgr2
01/19/2004	Capacity: Under	Medium Category			Prospect	09:00:00	09:30:00	Board Meeting		100	100	100	100	50/150	50/150	50/150	50/150	50/150	50/150	Reason	88-1ESUT	TNT Oppy 3	Prospect	2324				
01/20/2004	Not Assigned to Specific	Small Category			Prospect	10:00:00	10:30:00	Board Meeting		50	50	50	50	35/75	35/75	35/75	35/75	35/75	35/75	Reason	88-1ESUT	TNT Oppy 3	Prospect	2324				
01/19/2004	Not Assigned to Specific	Small Category			Prospect	11:00:00	16:00:00	Board Meeting		50	50	50	50	35/75	35/75	35/75	35/75	35/75	35/75	Reason	88-1ESOQ	TNT Oppy 1	Prospect	2324				
01/06/2004	Not Assigned to Specific	Small Category			Prospect	09:00:00	09:30:00	Board Meeting		50	50	50	50	35/75	35/75	35/75	35/75	35/75	35/75	Reason	88-1ES99	TNT Oppy 2	Prospect	2324				
01/19/2004	Not Assigned to Specific	Medium Category			Prospect	09:00:00	09:30:00	Board Meeting		100	100	100	100	50/150	50/150	50/150	50/150	50/150	50/150	Reason	88-1ESUT	TNT Oppy 3	Prospect	2324				

Figure 22. Sample Diary Report

Related Topics

- Generating and Printing a Diary Report on page 497
- Diary Report Fields on page 499

Generating and Printing a Diary Report

Perform the steps in the following procedure to generate and print a Diary report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print a Diary report

1. Navigate to the Function Space Diary screen.
2. Click either the Sales/Execution, Revenue Management, or Compact Diary view tab.
3. From the toolbar, click the Reports button.
4. In the Select a Report menu, click Diary Report.

   The following table describes some of the fields in the Diary Report Parameters dialog box.

Field	Comments
Property	The name of the property for which the report is being generated.
Quote	The name of the quote for which the report is being generated.
Specific Function Space	The name of the specific space for which the report is being generated.
Sales Manager	The name of the sales manager for whose functions the report is being generated.
Arrival Date	The start of the arrival dates shown in the report.
Departure Date	The end of the departure dates shown in the report.
All Diary Status Types	Select this check box to indicate that all events of all status types should be shown in the report.
Event Manager	The name of the sales manager for whose functions the report is being generated.
Transaction Type	Select a transaction type to indicate that just the selected type should be shown in the report. Choose from Add, Cancel, or Move.
All Transaction Types	Select this check box to indicate that all transaction types should be shown in the report.
Exception Type	Select an exception type to indicate that just the selected type should be shown in the report. The different options are: ■ **Flag: Overbook.** This option indicates that functions with the inventory status of Overbooked are included in the report.

Field	Comments
	■ **Flag: Option.** This option indicates that functions with the inventory status of Optioned are included in the report. ■ **Flag: Do Not Move.** This option indicates that functions with the Do Not Move flag selected are included in the report. ■ **Capacity: Over.** This option indicates that functions with an attendance that is greater than the maximum capacity are included in the report. ■ **Capacity: Under.** This option indicates that functions with an attendance that is less than the minimum capacity are included in the report. ■ **Capacity: Attendance < 10.** This option indicates that functions with an attendance that is less than 10 are included in the report. ■ **Status: Hold.** This option indicates that functions with a status of Hold are included in the report. ■ **Status: T1.** This option indicates that functions with a status of T1 are included in the report. ■ **Status: Cancel.** This option indicates that functions with a status of Cancel are included in the report. ■ **Status: D.** This option indicates that functions with a status of Definite are included in the report. ■ **Status: Lost/Turndown.** This option indicates that functions with a status of Lost/Turndown are included in the report. ■ **Not Assigned to Specific Space.** This option indicates that functions are booked for a function space type that is not configured or for a suite or for an indivisible space are included in the report. ■ **Assigned to Specific Space.** This option indicates that functions that are booked for a specific space, a suite, or an indivisible space are included in the report. ■ **Function Status <> Quote Status.** This option indicates that functions where the function status is not equal to the quote status are included in the report. ■ **Inventory Status: Unreserved.** This option indicates that functions where the function status is unreserved are included in the report.
All Diary Exception Types	When it is selected, this check box indicates that all diary exception types should be shown in the report.

Field	Comments
All Diary Capacity Exception Types	When it is selected, this check box indicates that all diary capacity exception types should be shown in the report, for example, Capacity: Under.
All Flag Exception Types	When it is selected, this check box indicates that all flag exception types should be shown in the report, for example, Flag: Overbook.

5 In the Diary Report Parameters dialog box, perform the following steps:

   a Specify some report parameters in the Parameters section.

   b Specify parameters in either or both of the Transaction Parameters and Exception Parameters sections.

   c Click Finish.

   The Diary report is generated in a Siebel Report Viewer window.

6 Click the Print Setup button to display a standard Windows print dialog box.

7 Choose appropriate printer settings, and then click OK.

Diary Report Fields

Table 93 lists the fields used in the Diary report.

Table 93. Diary Report Fields

Field	Comments	Source
Transaction Type	Type of diary transaction (Add, Move, or Cancel).	System
Exception Type	The type of diary exception. This includes flags exceptions, capacity exceptions, and so on.	Quotes
Property	The name of the property that was selected for the quote.	Quotes
CRS Code	The Central Reservations Code for the property.	Quotes
Quote Name	The name of the quote with which the function is associated.	Quotes
Quote #	The number of the quote with which the function is associated.	Quotes

Table 93. Diary Report Fields

Field	Comments	Source
Quote Status	The status of the quote (P,H, T2, T1, D, C, L/T).	Quotes
Function Status	The status of the function (P,H, T2, T1, D, C, L/T).	Quotes
Sales Mgr.	The sales manager associated with the quote.	Quotes
Event Mgr.	The event manager associated with the quote.	Quotes
Arrival Date	The arrival date for the quote.	Quotes
Departure Date	The departure date for the quote.	Quotes
Function Type	The type of function, for example, board meeting, conference, and so on.	Quotes > Functions
Function Date	The date of the quote function.	Quotes > Functions
Function Start Time	The start time for the function.	Quotes > Functions
Function End Time	The end time for the function.	Quotes > Functions
Function Room	The function space where the function is scheduled to take place. This value can be a category or specific space.	Quotes > Functions
Related FSC	The category related to the function's specific space.	Property Admin > Category
Prev. Room Function	The name of the function space where the function was due to take place before it was moved.	Quotes > Functions
Previous FSC.	The name of the category to which the original function space belonged.	Property Admin > Category
Set-Up Style	The setup style of the function.	Quotes > Functions
Attendance	The expected number of attendees.	Quotes > Functions
Function Room Min/Max Capacity for Set-Up Style	Maximum and minimum capacity values for the selected setup style.	Property Admin
Decision Date	The decision date for the quote.	Quotes

Table 93. Diary Report Fields

Field	Comments	Source
Employee ID	The user ID of the employee who made any changes.	System
Transaction Time	The date on which the transaction was performed.	System

About the FSI New Bookings Report

The event manager and sales manager can use the FSI New Bookings report (Figure 23) to track all of the new quotes on the basis of the quote's creation date as well as any status changes that occurred in any of the quotes. This report also shows the related revenue—for example, sleeping room revenue, sleeping room profit, function space revenue, and function space profit. Status change information includes when the change was done and by whom.

Users can choose to generate a New Bookings report, a Status Change report, or a combined report.

FSI New Booking ORACLE

Business Type	Property	Property CRS Code	Create Date	Quote Status	Previous Status	Status Change Date	Status Changed By	Quote Name	Quote Number	Decision Date	Sales Manager	Event Manager	Arrival Date	Departure Date	Total # of SR contracted	SR Avg. Rate	Weighted Avg. Benchmark Rate	SR Revenue	SR Profit	Function Space Revenue	Function Space Profit	Required Threshold	Function Space Revenue Per Sq. Ft Hour Booked	Function Space Profit Per Sq. Ft Hour Booked	SR Availability	FS Availability
	Default Organization		28/08/1999	Order Placed				HiSpeed Solution	1-2761						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		28/08/1999	In Progress				Purification Devices	1-2764						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		28/08/1999	In Progress				Base Systems Parts	1-2777						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		10/05/2000	In Progress				HB Executive Cards	1-43EE						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		10/05/2000	In Progress				HB Executive Cards	1-43EE						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		20/06/2000	In Progress				1-AUG5	1-AUG5						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		08/01/1999	In Progress				Aracid Volume Purchase	1-P3A	01/20/1999					0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		31/10/2001	In Progress				1CE-7DZ9	1CE-7DZ9						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		18/12/2001	In Progress				1CE-FM71	1CE-FM71						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		20/12/2001	In Progress				Customizable Product Validation Quote_SADMIN	1LS-9WI5						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		20/12/2001	In Progress				Open MRI 2001	1LS-9XHF						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		20/12/2001	In Progress				Open MRI 2002	1LS-9Y9K						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		10/12/2001	In Progress				Janus Open MRI Quote	1LS-AGPN						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		10/09/2001	Won				Angioplasty Catheters	1LS-AGRO						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		10/10/2001	Won				Cardiology Catheters	1LS-AH68						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		01/01/2002	In Progress				RQ MRI Quote	1LS-AI0D						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		02/01/2002	In Progress				AENA Catheters	1LS-AJI4						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		04/01/2002	Order Placed				Catheter Reorder	1LS-ATX4						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		04/01/2002	Order Placed				Catheter Reorder #2	1LS-ATY8						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		04/10/2001	Order Placed				7 French Catheter	1LS-AUAE						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		04/10/2001	In Progress				5 French Catheter	1LS-AUFQ						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		21/09/2001	In Progress				100 5 French Catheter	1LS-AUH3						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		12/06/2002	In Progress				1SIA-F53F	1SIA-F53F						0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		09/10/2002	In Progress				1SIA-UH9E	1SIA-UH9E	10/10/2002					0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		10/10/2002	In Progress				1SIA-VJOG	1SIA-VJOG	10/11/2002					0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		15/10/2002	In Progress				1SIA-WY79	1SIA-WY79	10/16/2002					0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		17/10/2002	In Progress				quote 1	1SIA-X1DF	10/18/2002					0	0	0	0	0	0	0		0	0	Total	Total
Local	Default Organization		21/09/2004	Order Placed				SIA_Quote2	88-2224N	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total
Local	Default Organization		21/09/2004	Order Placed				SIA_Quote3	88-2224V	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total
Local	Default Organization		21/09/2004	Order Placed				SIA_Quote4	88-22253	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total
Local	Default Organization		21/09/2004	Order Placed				SIA_Quote5	88-2225B	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total
Local	Default Organization		21/09/2004	Order Placed				SIA_Quote6	88-2225J	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total
Local	Default Organization		21/09/2004	Order Placed				SIA_Quote7	88-2225R	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total
Local	Default Organization		21/09/2004	Order Placed				SIA_Quote8	88-2225Z	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total
	Default Organization		21/09/2004	Order Placed				SIA_Quote9	88-22267	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total
Local	Default Organization		21/09/2004	Order Placed				SIA_Quote15	88-2226F	09/23/2004			09/22/2004	09/23/2004	0	0	0	0	0	0	0		0	0	Total	Total

Report Generated for SADMIN on 3/31/2005 Page 1 of 6

Figure 23. Sample FSI New Bookings Report

Related Topics

- Generating and Printing an FSI New Bookings Report on page 503
- FSI New Bookings Report Fields on page 504

Generating and Printing an FSI New Bookings Report

Perform the steps in the following procedure to generate and print an FSI New Bookings report.

This task is a step in Process of Administering Hospitality Reports on page 465.

To generate and print an FSI New Bookings report

1. Navigate to the Quotes screen > List view.
2. Query for a quote and drill down on the value in the Name field.
3. Scroll down from the Functions list and click the Function Space view tab.
4. From the toolbar, click the Reports button.
5. In the Select a Report menu, click FSI New Bookings Report.

   The following table describes some of the fields in the New Booking Report Parameters dialog box.

Field	Comments
New Bookings	When it is selected, this check box indicates that a New Bookings report is generated.
Status Change	When it is selected, this check box to generate a Status Change report.
Date	The date on which the quote was created.
Arrival Date	The arrival date entered for the quotes.
FS Availability	Function space availability—select one of the options from Total, Partial, or None.
SR Availability	Sleeping room availability—select one of the options from Total, Partial, or None.
Sales Manager	The sales manager with whom the quote should be associated.
Event Manager	The event manager with whom the quote should be associated.
Property	The name of the property for which the report is being generated.
Business Type	The type of business opportunity.
Status	The status of the quote.
Status Changed By	Employee login to identify the person who changed the quote.
CRS Code	The Central Reservations Code for the property. Enter this or the property name to specify a property for the report.

Field	Comments
Sort by 1	The first parameter that users can enter to sort the report results.
Sort by 2	The second parameter that users can enter to sort the report results.
Sort by 3	The third parameter that users can enter to sort the report results.

6 In the New Booking Report Parameters dialog box, perform the following steps:

   a Select either or both of the New Bookings and Status Change check boxes.

   b Choose some parameters from the Report, Availability, Manager, and Quote Parameters sections to filter the information as you require.

   c In the Sort Parameters section, select a maximum of three parameters that will be used to sort the report results.

   d Click Finish.

   The FSI New Bookings report is generated in an Oracle's Siebel Report Viewer window.

7 Click the Print Setup button to display a standard Windows print dialog box.

8 Choose appropriate printer settings, and then click OK.

FSI New Bookings Report Fields

Table 94 lists the fields used in the FSI New Bookings report.

Table 94. FSI New Bookings Report Fields

Field	Comments	Source
Bus. Type	The business type of the quote. This value is either Group or Local.	Quotes
Property	The property where the Quote resides.	Quotes
Property CRS Code	The Central Reservations Code for the property.	Quotes
Create Date	The date on which the quote was created.	Quotes
Quote Status	The sales status of the quote (D, T1, T2, H, P,C, L/T).	Quotes
Previous Status	The last sales status of the quote prior to the change.	Quotes > Audit Trail
Status Change Date	The date on which the sales status was changed.	Quotes > Audit Trail

Table 94. FSI New Bookings Report Fields

Field	Comments	Source
Status Changed By	The user who last changed the sales status.	Quotes
Quote Name	The name of the quote.	Quotes
Quote #	The number assigned to the quote.	Quotes
Decision Date	The decision date of the quote.	Quotes
Sales Mgr	The sales manager associated with the quote.	Quotes
Event Mgr	The event manager associated with the quote.	Quotes
Arrival Date	The arrival date for the quote.	Quotes
Departure Date	The departure date for the quote.	Quotes
Total # of SR contracted	The total number of sleeping rooms contracted across all room types and across all days in the room block.	System (calculated). This value is calculated based on room types used in the quote's room block.
SR Avg. Rate	The total sleeping room average rate for the entire room block across all room types, including occupancy calculations.	System (calculated). This value is rounded to the nearest dollar—no decimal. Currency: US, Canadian, Caribbean.
Weighted Avg. Benchmark Rate	The weighted average benchmark rate that is in place over the dates of the room block and across all room types used in the room block.	System (calculated). This value is rounded to the nearest dollar—no decimal. Currency: US, Canadian, Caribbean.
SR Revenue	The total sleeping room revenue across all room types (except suites) for the quote.	Quotes > Summary This value is rounded to the nearest dollar—no decimal. Currency: US, Canadian, Caribbean.

Table 94. FSI New Bookings Report Fields

Field	Comments	Source
SR Profit	The total sleeping room profit across all room types (except suites) for the quote.	Quotes > Summary This value is rounded to the nearest dollar with no decimal. Currency: US, Canadian, Caribbean.
Function Space Revenue	The total function space revenue associated with the quote.	Quotes > Summary This value is rounded to the nearest dollar—no decimal. Currency: US, Canadian, Caribbean.
Function Space Profit	The total function space profit associated with the quote.	Quotes > Summary This value is rounded to the nearest dollar—no decimal. Currency: US, Canadian, Caribbean.
Req. Threshold	The sum of the required thresholds for all of the different function space categories/specific spaces being held by the quote.	Quotes > Summary This value is rounded to the nearest dollar—no decimal. Currency: US, Canadian, Caribbean.
Function Space Revenue Per Sq. Ft Hour Booked	The function space revenue that the quote is generating for each square foot per hour of reserved inventory.	System (calculated). Currency: US, Canadian, Caribbean.
Function Space Profit per Sq. Ft Hour Booked	The function space profit that the quote is generating for each square foot per hour of reserved inventory.	System (calculated). Currency: US, Canadian, Caribbean.

Table 94. FSI New Bookings Report Fields

Field	Comments	Source
SR Availability	The availability status within the room block. This value is Total, Partial, or Not Available: ■ **Total.** All room block line items have a status of Reserved or Overbooked ■ **Partial.** At least one line item is Unreserved ■ **Not Available.** All room block line items are Unreserved	Quote > Summary Availability
FS Availability	The availability status within the event agenda. this value is Total, Partial, or Not Available: ■ **Total.** All the functions have a status of Reserved or Overbooked ■ **Partial.** When one or more functions are Optioned or Unreserved ■ **Not Available.** When no functions have a status of Reserved or Overbooked within the agenda	Quote > Summary Availability

Index

A

AAA Diamond rating, for a property 36
access groups, adding to catalogs and categories 84
account matrix 171
Accounting Event Check report
about 487
generating and printing 489
accounts
about 185
brands 189
business plan, creating 193
competitors, adding 190
credit card spending details 191
event templates 192
intermediary accounts 190
intermediary accounts, tracking 193
opportunities from event templates, creating 192
process flow for managing 187
process of managing 186
scenario for managing 185
transactions, viewing 193
travel control assessments, adding 191
travel profile, adding brands 189
travel profile, creating 188
travel profile, managing 187
Accounts screen 23, 186
active and backup bookings, managing in the Function Space Diary 394, 396
active and backup information, defining 130
Activities screen 23
activities, adding to a quote 254
Actualizing
function, on a 317
room block, on a 318
addresses, creating for properties 35
adjustment amounts, updating a series record 174
administration screens, purpose of 22
administrator setup tasks
adding property records 36
assigning an employee to a property team 41
creating addresses for properties 35
creating sell notes for a property 48
defining property day parts 40
defining property facilities 40
defining room service attributes 40
deleting special dates 49
list of Hospitality workflow processes 29
list of setup tasks 27
process of setting up properties 34
removing an employee to a property team 41
setting up special dates 49
verifying workflows are active 31
viewing the Special Dates calendar 50
affiliates
about host-affiliate relationships 225
host opportunity, associating with 226
host opportunity, creating 226
opportunity, creating 227
quotes, generating 247
aggregate quotes
about 236
compiling 236
evaluation, completing 237
price override 238
projected property, changing 239
agreement, generating from a quote 428
airports
adding to a property 36
shuttle service, to a property 36
allocations, calculating for menus and packages 350
alternate transportation to a property 37
arrival date
modifying in an event quote 253
updating at the quote level 317
assessment, adding to an opportunity 224
asset inventory status indicator
assigning status colors to inventory and assets 130
color scheme for inventory and asset statuses 130
defining turntime and time interval information 129
assets
about 330
about product revenue categories 75
adding catalog visibility 82
assigning status colors to assets 333
AutoBook and Non-Critical assets 331

automatic reservation of critical assets 330
booking critical and non-critical assets 334
cluster booking 332
cluster booking, launching 335
creating a parent revenue category 76
creating a product revenue category 76
creating a product revenue subcategory 76
creating a revenue category note 77
creating for property-specific products 103
creating generic catering products 86
creating generic room blocks 87
creating Hospitality assets 89
creating product revenue subcategories 75
creating property-specific products 87
creating simple products 78
defined 330
defining asset display method 90
double booking and Availability Gantt Chart view 331
double booking critical and non-critical assets 334
locating a substitute asset 338
locating owner of the booked asset 337
mapping a generic catering product to a property-specific product 88
mapping a generic room block to property-specific product 89
preparing a simple product base for a complex product 79
process of booking 333
process of creating complex products 79
process of setting up products and assets 74
reviewing and validating product versions 81
simple and complex products 77
viewing asset availability and booking information 336
viewing assets associated with a product 336

Assets Administration screen 22
asynchronous generation of multiple quotes 243
attachments
adding to an event opportunity 219
adding to an event order 444
creating for a quote 255
viewing an opportunity attachment 220

attributes, defining product 92
Audio/Visual Event Order type 437
Audit Trail option, activating 128
audit trail, viewing for orders 447
authorization level inventory controls, about 121
AutoBook and Non-Critical assets 331
automatic process, using Bypass button to circumvent 208
automatic reservation of critical assets 330
AVEO (Audio/Visual Event Order) type 437
average values
overriding 278
setting up 155

B

backup of quote, about generating 430
backup space
about 302
adding to functions 303
booking types 305
identifying function spaces that require 302
identifying specific space that requires 60
reserving 304
switching to 305

Banquet Event Orders
generating and printing reports 472
reports, about 469
reports, configuring report headers 465
reports, reviewing and adding specifications 471
specifications, viewing 446

Banquet Revenue Summary
about 479
reports, configuring report headers 468

Banquet Revenue Summary report
generating and printing 480

benchmark pricing, sleeping rooms 161
Best Fit Process, quotes 243
Best Fit Suite Only flag, about 288
billable line items, viewing 454
billing information
adding to an opportunity 220
gathering and confirming 435
managing event deposits using bill-to-form 222
updating and verifying billing information 255
using bill-to-information in event sales 222

booking
about 330
AutoBook and Non-Critical assets 331
automatic reservation of critical assets 330
critical and non-critical assets 334
defined 330
double booking and Gantt Chart view 331
fee information, entering and tracking 255
locating a substitute asset 338
locating the owner of the booked asset 337
process of booking Hospitality assets 333
types for function spaces 305
viewing asset availability and booking

information 336
business plan, creating for an account 193
Bypass button, using 208
Bypass flag, managing at the opportunity stage 288

C

Calendar screen 23
calendar, viewing Special Dates calendar 50
catalog categories, assigning to property-specific products 112
catalog visibility, adding to products 82
categories
about creating product revenue categories 75
adding product attributes 92
administration, associating revenue categories with products 135
booking specific suites 312
booking suite categories 311
canceling a suite category 313
creating a parent revenue category 76
creating a product revenue category 76
creating a product revenue subcategory 76
creating a revenue category note 77
creating product revenue subcategories 75
revenue, managing as a product 91
reviewing charge codes associated with a revenue category 142
scheduling a function in a specific suite 313
Category Administration screen 22
catering products
about booking as assets 330
creating generic 86
mapping a generic catering product to property-specific product 88
pricing administration, about 165
catering, gathering and confirming function details 434
charge codes
about 134
associating a service charge with a property 137
associating a tax code with a property 139
associating categories with products 135
associating charge codes with service charges 142
associating charge codes with tax codes 141
associating tax codes with service charges 140
charge code administration 140
creating a service charge 136
creating a tax code 139
defining charge codes 141
process of setting up 134
revenue category administration tasks 135
reviewing charge codes associated with a category 142
service charge administration 136
tax code administration 138
viewing property-specific service charges 143
viewing property-specific taxes 143
charts
functions 285
opportunity 229
quotes 285
revenue analysis 285
room blocks 286
cluster booking
assets 332
launching 335
cluster records, viewing 53
clusters
See property clusters
colors, assigning status colors to assets 333
compact sequence, about 381
competitors, adding to accounts 190
complex products
about 77
default product 81
defined 74
domain type, class 80
domain type, dynamic class 80
domain type, product 80
menus and packages 95
preparing a simple product base for a complex product 79
process of creating 79
reviewing and validating product versions 81
complimentary room pricing 412
configured space, defined 58
contacts
about 185
event templates, creating 195
opportunities, creating from event templates 196
process flow for managing 187
process of managing 186
scenario for managing 185
travel profile, managing 194
Contacts screen 23, 186
copying
function 294
room block line items 213
using to create multiple related functions 207

costing and profitability, setting up sleeping room costing data 161
credit card spending details 191
credit check information, entering for an event quote 256
Critical product resource type
about 330
automatic reservation of critical assets 330
booking 334
double booking 334

D

Data Administration screen 22
date and time changes
configuring availability status checking 315
inventory critical field 315
reserved room block, for a 317
dates
deleting special dates for a property 49
viewing the Special Dates calendar 50
Dates / Notes button
using for a particular property 323
Dates / Notes button, using for a property 323
day parts
defining property day parts 40
process of defining 128
setting up property day parts 128
validating 41
decoration and presentation, gathering and confirming function details 434
Definite, setting quote status to 430
deposits, managing event deposits 222
designation management, gathering details 434
diary
See Function Space Diary
discounts
account matrix 171
applying to line items 271
full day discounts 165
functions, reviewing 272
matrix discount 170
percentages, applying 270
reviewing quote 270
room blocks, reviewing 273
segment matrix 173
total order discount, viewing 444
total quote discount, reviewing 276
volume discounts 167
Do Not Move flag
configuring 62
using 260
double booking
critical and non-critical assets 334
Gantt Chart view, and the 331
drag and drop operations, Function Space Diary 393
driving directions
guest conveniences 36
property 37

E

EBC
See Event Booking Centers
employee
assigning to a property team 41
removing to a property team 41
end-user screens, purpose of 23
equipment, about setting up equipment bundles 74
evaluation activities
assigning 423
creating an evaluation response 423
revenue manager approval with negative profit variance 424
evaluation response, reviewing 425
evaluations
aggregate quotes 237
response, viewing 425
Evaluations Calendar, using 433
Evaluations screen 23
Event Booking Centers 39
event change management, pre-event confirmation details 435
event checks
about 449
billable line items, viewing 454
calculation rules for generating and displaying 457
event check reports and printouts 463
generating a trial check for an event 450
generating for all orders in a day 452
generating for an individual order 452
guest and accounting event check rules 456
line items, adding 453
menus and packages, adding as line items 344
nonbillable line items, viewing 454
orders, viewing 446
posting event checks 455
process of generating event checks 450
reviewing event checks 462
scenario 450
updating event orders 451
voiding event checks 463

Event Checks screen 23
event deposit, managing using bill-to-form 222
event details
confirming event details scenario 428
confirming sleeping room details 433
event change management 435
gathering and confirming billing information 435
gathering and confirming function details 434
gathering and confirming parking and transportation 435
gathering and confirming special request information 435
process of confirming function space details 434
process of gathering and confirming event details 433
event functions, performing a time shift 318
event manager, changing 249
event opportunity
about adding function agenda and line items 203
about querying for selected properties 213
adding a property to an opportunity 215
adding activities 219
adding an assessment 224
adding attachments 219
adding event billing information 220
adding notes to an event opportunity 220
adding room block information 208
capturing property information 224
copying a room block line item 213
creating a hierarchy of functions 206
entering a function agenda 203
managing event deposits using bill-to-form 222
process of adding details 217
specifying function agenda line items 205
using bill-to-information in event sales 222
using Bypass button 208
using copy to create multiple related functions 207
using function agenda buttons 206
viewing an opportunity attachment file 220
event orders, generating and managing
process of generating and managing 439
scenario 438
synchronizing functions and function line items 442
updating 451
visibility and viewing event orders 445
event property
adding functions and function line items to a quote 257
adding quote notes 254
creating a quote for 246
creating attachments for a quote 255
entering and tracking booking fee information 255
entering credit check information for an event quote 256
managing quote functions from the Function screen 261
modifying an event quote 248
modifying multiple quotes 250
process of adding details to event quote 252
quote summary functions list 268
quote summary negotiation rates list 268
quote summary revenue thresholds list 267
quote summary room block line items list 269
reviewing function revenue estimates 276
reviewing quote details and review estimates 265
reviewing quote summary information 265
updating and verifying billing information 255
validating functions and function line items associated with a quote 257
event sales, using bill-to-information 222
event shifting, at the quote stage 321
event templates
about 177
account templates, creating 192
applying to an opportunity 216
contacts, creating 195
creating from a quote 252
creating from an opportunity 217
creating opportunities from contact 196
function agenda and line items, adding 180
generic, creating 178
generic, defined 177
opportunities, creating from 192
process of creating 177
property-specific, creating 179
property-specific, defined 177
quotes, applying to 251
room block information, adding 181
room blocks and line items, adding to 182
event turnover checklist
completing and submitting 430
rejecting 432
reviewing and accepting the turnover checklist 432
submitting the turnover record to events management 432

F

facilities, defining property facilities 40
features
about 93
managing at the opportunity stage 288
finalization process, quotes associated with nonparticipating properties 375
floor plans
adding property 46
viewing in the Function Space Diary 396
FSI Diary
See Function Space Diary
FSI New Bookings report, generating and printing 503
full day discounts
about 165
defining 166
example of working 166
function agenda
about adding to an event opportunity 203
creating a hierarchy of functions 206
entering a function agenda 203
event template, adding to 180
specifying function agenda line items 205
using copy to create multiple related functions 207
using function agenda buttons 206
function orders, creating 440
Function Scheduling button, using 313
Function screen
about 23
managing quote functions 261
function space
about associating setup styles with suites 70
about pricing 406
about time shifts for function spaces and sleeping rooms 265
adding product attributes 92
adding product features 93
assigning a setup style to a function space category 64
assigning a setup style to a property and associated a package 63
assigning a specific space 297
assigning colors to active and backup function spaces 130
assigning status colors to inventory and assets 130
associating a specific space with a category 61
associating suites with a category 70
booking types 305
canceling a function 293
color scheme for inventory and asset statuses 130
completing the detailing of a function 300
copying a function 294
creating a function space category 59
creating a subfunction 299
creating a subfunction for the subfunction 300
creating an indivisible specific-space suite 57
creating configured space 58
creating sleeping rooms 65
defined and characteristics 55
defining function space inventory controls 121
defining setup style LOVs 63
defining turntime and time interval information 129
detailing a function 298
editing function space inventory controls 124
event change management 435
flagging a function for spacious set 301
gathering and confirming billing information 435
gathering and confirming function details 434
gathering and confirming parking and transportation 435
gathering and confirming special request information 435
inconsistent setup style and function space 300
managing as a product 91
managing ineffective function spaces in the Function Space Diary 395
optimizing setup styles for specific spaces 65
optioning function space 292
optioning in the Function Space Diary 394
overbooking function space 293
overbooking in the Function Space Diary 394
pricing waterfall, reviewing 274
process of confirming function space details 434
process of setting up 56
process of setting up suites for a property 68
querying function space inventory controls 123
reports, about 489
requiring backup space 302
reservation 291
room rentals 406
setting up a category for suites 70
setting up a configured specific space suite 69
setting up an indivisible specific space

suite 69
setting up function space style translations 132
setting up suite administration 70
setup style combinations, and 316
suites, booking for functions 300
understanding function status values 296
unit of measure conversions for function space area 301
using Reserve and Next Fit to hold function space 291
with product features, changing 261
Function Space Administration screen 22
Function Space Calendar, using 159
Function Space Diary
about 23
Assign Method 397
assigning category bookings to specific spaces 397
changing booking inventory statuses 398
color coding 389
converting bookings 393
defining asset display method 90
deleting out of order designations 398
deleting unavailable designations 398
drag and drop operations 393
expanding all and collapsing all methods 391
floor plan website option 48
floor plan, allow viewing 47
icons 387
information display options 389
moving forward and backward in the time range 392
navigating to the Function Space Diary 402, 403
overview 378
printing 404
process of using 378
querying for bookings and functions 399
querying for function spaces 399
querying for related function spaces 400
report, generating and printing 497
reports, about 495
screen elements 382
total sleeping room availability 382
user preferences, storing 393
viewing floor plans 396
viewing function and booking details 383
visibility layers 379
Function Space Diary, views 380
Compact Diary view 381
Revenue Management view 380
Sales/Execution Diary view 380
Total Availability view 382
function space pricing
defining default rules 154
exceptions, defining 155
full day discounts, setting up 165
setting up minimum and maximum controls 165
unavailable or out of order 157
function space pricing administration
about and tasks 153
defining a profit series and percentages 150
defining function space pricing types and rental fees 153
defining function space type exceptions 155, 162, 164
setting up pricing day parts 153
Function Space Products report, generating and printing 490
Function Space Setup Style report, generating and printing 494
function status, and released inventory 316
function types, setting up 155
functions
accessing through quotes and orders 340
actualizing 317
adding attachments to an event order 444
adding functions and function line items to a quote 257
adding menu and package line items 341
adding notes to an event order 443
adding to a quote 258
associating event orders with a function line item 441
backup space, about 302
backup space, adding 303
changing the primary event for a function 441
charts 285
creating custom menus and packages 349
creating functions 442
discount percentages, applying 270
discounts, reviewing 272
line items, adding to a quote 258
managing quote functions from the Function screen 261
performing a time shift of event functions 318
preventing functions from being moved 260
revenue analysis charts 285
revenue estimates, reviewing 277
switching to backup space 305
synchronizing functions and function line items 442
validating 259
validating functions and function line items

associated with a quote 257
viewing all orders associated with a quote 445
visibility and viewing event orders 445
future date adjustments, defining 151

G

Gantt chart calendar 23
general policies 44
Business Mix 46
Cancellation Policy 46
Cross Selling Policy 46
Future Year Booking Policy 46
Opportunity Policies 46
Sleeping Room Policies 46
Special Property Policies 46
General product resource type, about 330
generic event template, creating 178
Go to Diary button, using for a property 323
government rates
default pricing rules 162
exception rules 163
government sleeping room pricing, defining 162
group projected and blocked availability, viewing 326
guest conveniences
driving directions 36
setting up 35
Guest Conveniences screen 23
Guest Event Check report
about 484
generating and printing 486
guest event checks
about 456
calculating rules for generating and displaying event checks 457
event check reports and printouts 463
reviewing event checks 462
voiding event checks 463

H

home page, about and example 25
Home screen 24
Hospitality Accounts
See accounts
Hospitality Contacts
See contacts
Hospitality revenue management evaluation
See revenue management evaluation
host opportunities
affiliate opportunity, creating 227
associating affiliates 226
creating 226
host quotes, generating 247
host-affiliate opportunities
affiliate opportunity, creating 227
generating quotes from 247
host opportunity, creating 226
host-affiliate relationships, about 225

I

indivisible space, defined 57
intermediary accounts 190
defined 193
opportunities, viewing 193
tracking 193
inventory controls, setting up
defining function space inventory controls 121
defining sleeping room inventory controls 124
displaying function space inventory control information 122
displaying sleeping room inventory control information 125
editing function space inventory controls 124
editing sleeping room inventory controls 125
process of setting up 120
querying function space inventory controls 123
querying sleeping room inventory controls 125
visibility layers 120
inventory critical fields
about 315
date and time changes at the function level 315
date and time changes at the room block level 317
function space and setup style combinations 316
function status and released inventory 316
quote level 317
room block changes and availability checks 317
room block level 316
inventory reservation
about changing critical attributes 314
inventory critical fields at the function level 315
inventory status
assigning status colors to assets 333
booking critical and non-critical assets 334
double booking and Gantt Chart view 331
double booking critical and non-critical

assets 334
locating a substitute asset 338
locating the owner of the booked asset 337
viewing asset availability and booking information 336
viewing assets associated with a product 336
inventory, working with
actualizing a function 317
actualizing a room block 317
assigning a function to a specific space 297
background workflow processes at the quote level 314
booking specific suites 312
booking suite categories 311
canceling a function 293
canceling a suite category 313
canceling room blocks 311
changing attributes critical to inventory reservation 314
checking inventory availability 322
completing the detailing of a function 300
copying a function 294
creating a subfunction 299
creating a subfunction for the subfunction 300
creating and reserving a new room block 307
detailing a function 298
event shifting at the quote stage 321
flagging a function for spacious set 301
function space reservation 291
inconsistent setup style and function space 300
inventory critical fields at the function level 315
managing function characteristics 288
managing functions at the quote stage 291
managing property characteristics 290
managing room block characteristics 289
managing room blocks at the quote stage 306
optioning function space 292
overbooking a room block 307
overbooking function space 293
parceling 309
performing a time shift of event functions 318
performing a time shift of room blocks 319
process of working with 288
quote generation processes 290
reviewing group availability 324
reviewing group projected and blocked availability 326
reviewing SR Type Availability 323
reviewing total availability 324, 325
reviewing total group availability 322
reviewing transient availability 324
room block inventory buttons 310
scheduling a function in a specific suite 313
sleeping room availability logic 308
suites, booking for functions 300
understanding function status values 296
unit of measure conversions for function space area 301
using reserve and next fit to hold function space 291

L

Line Item Sum field 411
line items
adding to a quote function 258
adding to event checks 453
adding to room blocks 212
billable, viewing 454
discount percentages, applying 270
discount price, applying 271
functions, validating 259
negotiated price, applying 271
nonbillable, viewing 454
orders, viewing 443
resource cluster, adding 259
room blocks, copying 212

M

macro estimates
adding to an opportunity 222
Calculated Average Check 223
Calculated Total Revenue 223
quotes, reviewing 283
matrix series
about 170
account matrix 171
creating 171
segment matrix 173
setting up 170
updating adjustment amounts 174
maximum price
for room types 416
for sleeping rooms 161
menu and package types
Menu Per Person, set price 365
Menu Per Person, split price 368
Package Each 363
Package Item Price 360
Package Per Person 356
menu, gathering and confirming function details 434
menus

See menus and packages
menus and packages
defined 95
revenue breakouts 96
revenue estimate examples 352
types 96, 339, 356
menus and packages, managing
about managing 339
accessing functions through quotes and orders 340
adding line items to a function 341
adding line items to an event check 344
adding products 347
calculating system allocations 350
creating custom menus and packages 349
displaying revenue estimates 350
editing menus, packages, and line items 344
number of times a menu was sold, viewing 351
process of managing 340
substituting products 351
menus and packages, setting up
about setting up 95
adding items to a menu 106
adding items to a package 109
adding menus to a property 104
adding packages to a property 108
associating prices with a menu 107
associating prices with a package 111
creating menus 104
creating packages 107
menu types, examples 97
package types, examples 98
process of setting up 99
revenue allocations 114
minimum price
for room types 416
for sleeping rooms 161
Mobile Star rating, for a property 38

N

National Sales Organization 39
negotiated prices, applying to line items 271
negotiation floor
defined 415
modifying the negotiation floor rate 426
sleeping rooms 161
updating and reducing 425
updating the existing negotiation rate 426
negotiation floor and exceptions
defining a profit series and percentages 150
defining function space pricing types and rental fees 153
defining function space type exceptions 155
defining sleeping room exceptions 162, 164
defining weekend prices 150
function space pricing administration 153
setting up pricing day parts 153
negotiation rates, updating for quotes 263
neighborhood characteristics, defining for a property 42
Next Fit button, using to hold function space 291
No Banquet Event Order, about 437
Noise Flag, about 288
Non Critical product resource type
about 330
AutoBook and Non-Critical assets 331
booking 334
double booking 334
nonbillable line items, viewing 454
nonparticipating properties
about 371
about pricing 149
Event Booking Centers 39
finalization process for quotes 375
generating quotes for 373
National Sales Organization 39
opportunity development 372
orders 376
process of managing 372
quote evaluation, sending to 375
quote summary, sending to 374
quotes, and 243
setting up 39
notes
adding notes to an event opportunity 220
adding quote notes 254
adding to an event order 443
NPP
See nonparticipating properties
NSO
See National Sales Organization

O

occupancy, and pricing 411
opportunities
about adding a function agenda and line 203
about querying for selected properties 213
adding a property to an opportunity 215
adding activities to the event opportunity 219
adding an assessment 224
adding attachment to an event opportunity 219

adding details to the event opportunity 217
adding event billing information 220
adding features to the function agenda 93
adding notes to an event opportunity 220
adding room block information 208
affiliate opportunity, creating 227
capturing property information 224
capturing with Rapid Room Block 209
changing arrival date for the event opportunity 218
charts 229
contact event templates, creating from 196
copying a room block line item 213
creating a hierarchy of functions 206
creating an event template from 217
creating an opportunity 198
entering a function agenda 203
event templates, applying 216
event templates, creating from 192
generating quotes from 246
host opportunity, associating with affiliates 226
host-affiliate, creating 226
macro estimates, adding 222
managing event deposits using bill-to-form 222
nonparticipating properties 372
Opportunity Explorer, using 228
process of capturing opportunities 198
properties, adding 215
Property Locator, using 213
Property screen
using 215
Quick Opportunity Capture 224
recurrence details 234
recurring event, creating 232
recurring events, about 231
recurring events, process of creating 232
recurring opportunity, creating 232
room block information, adding 209
room block line items, adding 212
room blocks, adding 210
scenario 197
segment 202
sleeping room rates applied 202
specifying function agenda line items 205
subfunctions at the opportunity stage 288
subopportunities 233
using bill-to-information in event sales 222
using Bypass button 208
using copy to create multiple related functions 207
using function agenda buttons 206
viewing an opportunity attachment file 220
Opportunities screen 24
Opportunity Explorer, using 228
opportunity stage
managing function characteristics 288
managing property characteristics 290
managing room block characteristics 289
Order Functions view, adding products 452
order pricing
about and quotes 406
calculating weighted average room rates 415
complimentary room pricing 412
function line item and revenue data repricing 409
function space pricing 406
function space room rentals 406
minimum and maximum price 416
pricing and room occupancy 411
pricing and the negotiation floor 415
profit and revenue thresholds 407
Refresh button 410
Reprice All button 410
Reprice button 409
sleeping room pricing 411
suite pricing 416
threshold calculation example 407
weekday and weekend pricing 414
order record visibility 445
Order screen 24
orders
about event order generation 437
adding attachments 444
adding notes 443
associating event orders with a function line item 441
audit trail, viewing 447
BEO specifications, viewing 446
changing the primary event 441
creating function orders 440
creating functions 442
event checks, viewing 446
generating event checks for all orders in a day 452
generating event checks for an individual order 452
generating primary event orders 439
line items, viewing 443
nonparticipating properties 376
total discount, viewing 444
viewing all orders associated with a quote 445
overbook and option level inventory controls, about 121

overbooking
function space 293
room block 307
oversold policies
Arrange Accommodation 45
defined 44
Direct Billing Can Be Arranged 45
Pay For One Night Room/Tax 45
Provide One Phone Call 45
Provide Transportation 45
owner, locating for a booked asset 337

P

packages
See menus and packages
parceling room block inventory 309
parent revenue category, creating 76
parking and transportation, gathering and confirming 435
policies, defining for properties 44
post event template
about 183
creating 183
defined 183
price lists
setting up 147
viewing for properties 114
price override, room blocks associated with aggregate quotes 238
prices
associating with menus and packages 111
associating with property-specific menus 107
associating with property-specific products 103
creating intervals for property-specific products 112
pricing
calculating weighted average room rates 415
complimentary room pricing 412
day parts, setting 153
minimum and maximum price 416
pricing and the negotiation floor 415
room occupancy, and 411
suite pricing 416
types, defining 153
waterfall, reviewing 274
weekday and weekend pricing 414
Pricing Administration screen 23
primary event
changing primary event order 441
generating orders 439
printing
Accounting Event Check report 489
Banquet Event Order report 472
Banquet Revenue Summary report 480
Diary report 497
FSI New Bookings report 503
Function Space Products report 490
Function Space Setup Style report 494
Quote Summary report 484
Schedule of Events report 478
printouts, event check reports 463
Product Administration screen 23
product attributes
adding to a product 93
defining 92
product catalog
adding access groups 84
adding products 83
creating 82
creating a category 83
product category
adding access groups 84
adding products 83
product consumption
examples 86
forecasting 85
product features, about 93
product pricing
about creating a property pricing profile 149
about products and property pricing 146
aggregate volume discounts 170
catering product pricing administration 165
creating a property pricing profile 149
creating default prices for sleeping rooms 160
creating exceptions to default prices for sleeping rooms 162
defining a profit series and percentages 150
defining function space pricing rules 153
defining function space type exceptions 155
defining sleeping room exceptions 162, 164
defining weekend prices 150
function space pricing administration 153
function spaces, unavailable or out of order 157
future date adjustments 151
nonparticipating properties pricing 149
process of setting up product and property pricing 145
property pricing administration 148
setting up average values and function types 155
setting up price lists 147
setting up pricing day parts 153

setting up sleeping room costing data 161
sleeping room pricing administration 159
special dates, setting up 152
suite pricing administration 175
volume discounts 167
volume discounts, associating with a property 169
volume discounts, creating 167
weekend and weekday property pricing 149

product revenue category
creating 76
creating notes 77
creating product revenue subcategories 75

product versions, reviewing and validating 81

products
about product administration 74
about product revenue categories 75
adding catalog visibility 82
adding product attributes 92
adding product to the Order Function view 452
adding products to catalogs and categories 83
adding to a menu or package 347
adding to properties 101
associating revenue categories 135
attributes, adding 93
attributes, defining 92
complex 74
creating a catalog 82
creating a catalog category 83
creating a parent revenue category 76
creating a revenue category 76
creating a revenue category note 77
creating a revenue subcategory 76
creating assets 89
creating generic catering products 86
creating generic room blocks 87
creating product revenue subcategories 75
creating property-specific products 87, 100
creating simple products 78
defining asset display method 90
features, changing function spaces 261
forecasting product consumption 85
managing function spaces, sleeping rooms, and revenue categories as products 91
mapping a generic catering product to a property-specific product 88
mapping a generic room block to property-specific product 89
preparing a simple product base for a complex product 79
process of creating complex products 79
process of setting up products and assets 74
property pricing views 146
reviewing and validating product versions 81
simple and complex products 77
simple products 74
substituting in a menu or package 351
viewing associated assets 336

profile, properties 43

profit and revenue thresholds
about 407
threshold calculation example 407

profit series, defining with percentages 150

properties
AAA Diamond rating 36
about associating setup styles with suites 70
about querying for selected properties 213
about time shifts for function spaces and sleeping rooms 265
adding a property to an opportunity 215
adding activities to a quote 254
adding functions and function line items to a quote 257
adding menus 104
adding packages 108
adding products 101
adding property records 36
adding quote notes 254
adding to an opportunity 215
aggregate quotes, changing 239
airport 36
airport shuttle service 36
alternate transportation to 37
assigning a setup style and associating a package 63
assigning a setup style to a function space category 64
assigning an employee to a property team 41
associating a service charge with a property 137
associating a specific space with a category 61
associating a tax code with a property 139
associating suites with a category 70
associating with default catalog categories 100
capturing property information 224
clusters 50
creating a function space category 59
creating a quote for an event property 246
creating addresses 35
creating an indivisible specific-space suite 57
creating attachments for a quote 255

creating configured space 58
creating property-specific menus 104
creating property-specific packages 107
creating sell notes for a property 48
creating sleeping rooms 65
defining property day parts 40
defining property facilities 40
defining room service attributes 40
defining setup style LOVs 63
deleting special dates 49
driving directions 37
entering and tracking booking fee information 255
entering credit check information for an event quote 256
floor plans, adding 46
function space defined and characteristics 55
general policies 44
generating quotes from opportunities 246
guest conveniences, setting up 35
managing quote functions from the Function screen 261
Mobile Start rating 38
modifying an event quote 248
modifying multiple quotes 250
neighborhood characteristics 42
nonparticipating 39
nonparticipating, about 371
optimizing setup styles for specific spaces 65
oversold policies 44
policies 44
process of adding details to event quote 252
process of setting up function space 56
process of setting up properties 34
process of setting up suites for a property 68
profiling 43
Property Locator, using 213
Property screen
using 215
quotes and nonparticipating properties 243
removing an employee to a property team 41
setting up a category for suites 70
setting up a configured specific space suite 69
setting up an indivisible specific space suite 69
setting up special dates 49
setting up suite administration 70
updating and verifying billing information 255
validating functions and function line items associated with a quote 257
viewing price lists 114
viewing property-specific service charges 143
viewing property-specific taxes 143
viewing SR (sleeping room) type availability 323
viewing the Special Dates calendar 50

Property Administration screen 23

property clusters
about 50
assigning to a user 52
assigning visibility to a user 53
booking assets 332
creating 51
defined 50
visibility 52

property day parts
setting up 128
validating 128

Property Locator, using 213

property pricing
about creating a property pricing profile 149
about products and property pricing 146
catering product pricing administration 165
creating a profile 149
creating a property pricing profile 149
creating default prices for sleeping rooms 160
creating exception to default prices for sleeping rooms 162
defining a profit series and percentages 150
defining function space pricing rules 153
defining function space type exceptions 155
defining sleeping room exceptions 162, 164
defining weekend prices 150
function space pricing administration 153
function spaces, unavailable or out of order 157
future date adjustments 151
nonparticipating properties pricing 149
process of setting up product and property pricing 145
property pricing administration 148
property pricing views 146
setting up average values and function types 155
setting up price lists 147
setting up pricing day parts 153
setting up sleeping room costing data 161
sleeping room pricing administration 159
special dates, setting up 152
suite pricing administration 175
volume discounts, associating with a property 169

weekend and weekday property pricing 149
Property Pricing Administration screen 23
Property screen
described 24
Property screen, using 215
property team
assigning an employee 41
removing an employee 41
property-specific event templates
applying to a quote 251
creating 179
property-specific products
adding to properties 101
assigning to catalog categories 112
associating prices 103
creating 87, 100
creating assets 103
creating pricing intervals 112
mapping to a generic catering product 88
mapping to a generic room block 89
sharing with other properties 111
property-specific quotes
See quotes

Q

querying, for selected properties 213
quick opportunity capture, using 224
quote and order pricing
about 406
calculating weighted average room rates 415
complimentary room pricing 412
function line item and revenue data repricing 409
function space pricing 406
function space room rentals 406
minimum and maximum price 416
pricing and room occupancy 411
pricing and the negotiation floor 415
profit and revenue thresholds 407
Refresh button 410
Reprice All button 410
Reprice button 409
sleeping room pricing 411
suite pricing 416
threshold calculation example 407
weekday and weekend pricing 414
quote evaluation
about 423
assigning evaluation activities 423
creating an evaluation response 423
revenue manager approval with negative profit variance 424
sending to nonparticipating properties 375
Quote Event Calendar, viewing 284
quote summary
functions list 268
negotiation rates list 268
revenue thresholds list 267
room block line items list 269
sending to nonparticipating property 374
Quote Summary report
about 482
generating and printing 484
quotes
about and process flow 242
about time shifts for function spaces and sleeping rooms 265
adding activities to a quote 254
adding functions and function line items 257
adding quote notes 254
aggregate evaluation 237
aggregate, changing projected property 239
aggregate, compiling 236
aggregate, price override 238
asynchronous generation of multiple 243
Best Fit Process 243
calculating weighted average room rates 415
charts 285
completing and submitting the event turnover checklist 430
complimentary room pricing 412
confirming sleeping room details 433
creating an even template from 252
creating attachments for a quote 255
discounts, applying percentage 270
discounts, reviewing 270
entering and tracking booking fee information 255
entering credit check information for an event quote 256
evaluating the event quote 422
evaluation response, viewing 425
evaluation, sending to nonparticipating properties 375
event change management 435
event manage, changing 249
event templates, applying 251
finalizing scenario 428
function line item and revenue data repricing 409
function space pricing 406
function space room rentals 406
functions, adding 258
gathering and confirming billing information 435

gathering and confirming function details 434
gathering and confirming parking and transportation 435
gathering and confirming special request information 435
generating affiliate quotes 247
generating an agreement from a quote 428
generating an event quote 246
generating from host-affiliate opportunities 247
generating from opportunities 246
generating from recurring events 235
generating host quotes 247
generating subopportunities 235
line items, adding to a function 258
list of tasks 245
macro estimates, reviewing 283
managing quote functions from the Function screen 261
minimum and maximum price 416
modifying an event quote 248
modifying arrival date 253
modifying multiple quotes 250
negotiation rates 263
nonparticipating properties finalization process 375
nonparticipating properties, generating 373
order pricing and quotes 406
overriding average values 278
pricing and room occupancy 411
pricing and the negotiation floor 415
process of adding details to an event quote 252
process of confirming function space details 434
process of finalizing a quote and managing turnover 428
process of gathering and confirming event details 433
profit and revenue thresholds 407
quote approval with negative profit variance 424
Quote Event Calendar 284
quote generation process 290
quote summary functions list 268
quote summary negotiation rates list 268
quote summary revenue thresholds list 267
quote summary room block line items list 269
quotes and nonparticipating properties 243
Refresh button 410
rejecting the turnover checklist 432
reports, about 501
Reprice All button 410
Reprice button 409
resource cluster line items, adding 259
responding to a quote evaluation 423
reviewing and accepting the turnover checklist 432
reviewing function revenue estimates 276
reviewing quote details and review estimates 265
reviewing quote summary information 265
room block information, managing 261
room block information, updating 262
Room Block Summary 264
room blocks, copying 309
room blocks, updating 262
sales manager, changing 249
scenario for managing 245
setting the quote status to Definite 430
sleeping room pricing 411
submitting a quote for revenue evaluation 239, 421
submitting the turnover record to events management 432
suite pricing 416
summary, sending to a nonparticipating property 374
synchronizing 442
threshold calculation example 407
total discount, reviewing 276
updating and verifying billing information 255
validating functions and function line items 257
validating functions and line items 259
viewing all orders associated with quotes 445
weekday and weekend pricing 414

Quotes screen 24

quotes stage
assigning a function to a specific space 297
background workflow processes at the quote level 314
booking specific suites 312
booking suite categories 311
canceling a function 293
canceling a suite category 313
canceling room blocks 311
completing the detailing of a function 300
copying a function 294
creating a subfunction 299
creating a subfunction for the subfunction 300
creating and reserving a new room block 307
detailing a function 298

event shifting 321
flagging a function for spacious set 301
inconsistent setup style and function space 300
managing functions at the quote stage 291
managing room blocks at the quote stage 306
optioning function space 292
overbooking a room block 307
overbooking function space 293
reviewing time shift information 320
scheduling a function in a specific suite 313
sleeping room availability logic 308
suites, booking for functions 300
understanding function status values 296
unit of measure conversions for function space area 301
using reserve and next fit to hold function space 291

R

Rapid Room Block, using 209
recurrence details, setting 234
recurring events
about 231
aggregate quote, compiling 236
creating 232
creating subopportunities 233
opportunity, creating 232
price override 238
process of creating 232
quotes, generating from 235
recurrence details 234
types 231
Refresh button, using 410
relationships, host-affiliate 225
released inventory, and function status 316
rental fees, defining 153
report headers, configuring 465
report logos, adding 468
reports
Accounting Event Check report 487
Banquet Event Orders reports 469
Banquet Revenue Summary reports 479
Diary reports 495
event check reports 463
FSI New Bookings reports 501
Function Space Products reports 489
Function Space Setup Style reports 493
generating and printing the Accounting Event Check report 489
generating and printing the Banquet Event Orders report 472
generating and printing the Banquet Revenue Summary report 480
generating and printing the Diary report 497
generating and printing the FSI New Bookings report 503
generating and printing the Function Space Products report 490
generating and printing the Function Space Setup Style report 494
generating and printing the Guest Event Check report 486
generating and printing the Quote Summary report 484
generating and printing the Schedule of Events report 478
Guest Event Check report 484
process of generating 471
process of setting up 465
Quote Summary report 482
Schedule of Events reports 476
validating the Print Line in SOE 477
Reprice All button, using 410
Reprice button, using 409
reservation
AutoBook and Non-Critical assets 331
automatic reservation of critical assets 330
Reserve button, using to hold function space 291
resource cluster line items, adding 259
resource types, list of 330
resume template
about 183
creating 183
defined 183
revenue allocations
for menus and packages 114
package within a package example 117
three-item package with menu per person example 117
two-item package example 116
two-item package with discounted price example 116
revenue analysis, charts 285
revenue categories
administration tasks 135
associating with products 135
revenue estimates, changing 282
revenue estimates
changing 282
charts 285
displaying for menus and packages 350
functions, reviewing 277
macro estimates, adding to an opportunity 222

macro estimates, reviewing 283
Menu Per Person, Set Price example 355
Menu Per Person, Split Price example 355
Package Each example 353
Package Item Price example 354
Package Per Person example 353
quote negotiation rates, updating 263
quote summary functions list 268
quote summary negotiation rates list 268
quote summary revenue thresholds list 267
quote summary room block line items list 269
reviewing and quote details 265
reviewing function revenue estimates 276
reviewing quote summary information 265

revenue management evaluation
about 418
completing the revenue evaluation form 419
evaluating the quote event 422
modifying the negotiation floor rate 426
responding to a quote evaluation 423
revenue manager procedures 419
sales representative procedures 419
scenario 418
submitting a quote 239, 421
updating and reducing the negotiation floor 425
updating the existing negotiation rate 426

revenue manager
modifying the negotiation floor rate 426
quote approval with negative profit variance 424
revenue management procedures 419
submitting a quote evaluation form 240, 421

room block information
adding 209
event templates, adding to 181
managing in quotes 261
updating in quotes 262

room block line items
adding 212
copying 212

Room Block Summary form 264

room blocks
actualizing 318
adding 210
adding room block information 209
booking specific suites 312
booking suite categories 311
canceling a suite category 313
canceling room blocks 311
charts 286
copying at the quote stage 309
copying line items 212
creating and reserving a new room block 307
discount percentages, applying 270
discounts, reviewing 273
event templates, adding to 182
inventory critical fields 316
inventory, parceling 309
line items, adding 212
managing at the quote stage 306
managing property characteristics 290
managing room block characteristics 289
overbooking a room block 307
performing a time shift 319
price override, aggregate quotes 238
quotes, managing 261
Rapid Room Block 209
room block changes and availability checks 317
scheduling a function in a specific suite 313
sleeping room availability logic 308
Summary form 264
updating in quotes 262

Room Blocks screen 24

room service attributes, defining 40

rooms
about associating setup styles with suites 70
about time shifts for function spaces and sleeping rooms 265
adding room block information 208
assigning a setup style to a function space category 64
assigning a setup style to a property and associated a package 63
associating a specific space with a category 61
associating suites with a category 70
calculating weighted average room rates 415
copying a room block line items 213
creating a function space category 59
creating an indivisible specific-space suite 57
creating configured space 58
creating default prices for sleeping rooms 160
creating exceptions to default prices for sleeping rooms 162
creating generic room blocks 87
creating sleeping rooms 65
defined and characteristics 55
defining government sleeping room pricing types and rates 162
defining setup style LOVs 63
defining weekend prices 150
function space room rentals 406
mapping a generic room block to property-

specific product 89
occupancy, and pricing 411
optimizing setup styles for specific spaces 65
pricing and the negotiation floor 415
process of setting up 56
process of setting up suites for a property 68
setting up a category for suites 70
setting up a configured specific space suite 69
setting up an indivisible specific space suite 69
setting up suite administration 70
sleeping room pricing administration 159

S

sales manager, changing 249
sales representative
revenue management procedures 419
updating the existing negotiation rate 426
Schedule of Events
about 476
generating and printing 478
validating the Print Line 477
screens
purpose of administration screens 22
purpose of end-user screens 23
searching, about querying for selected properties 213
segment matrix series 173
sell note, creating for a property 48
service charges
about and process of defining 134
associating a tax code with a property 139
associating categories with products 135
associating charge codes with service charges 142
associating charge codes with tax codes 141
associating tax codes with service charges 140
associating with a property 137
charge code administration 140
creating a service charge 136
creating a tax code 139
defining charge codes 141
process of setting up 134
revenue category administration tasks 135
reviewing charge codes associated with a category 142
service charge administration 136
tax code administration 138
viewing property-specific service charges 143
viewing property-specific taxes 143
setup style
combination, and function space 316
inconsistent setup style and function space 300
reports, about 493
setup tasks
See administrator setup tasks
simple products
about 77
creating 78
defined 74
Sleeping Room Calendar, using 164
sleeping room pricing
benchmark pricing 161
default rules 160
exceptions 162
maximum pricing 161
minimum pricing 161
negotiation floor 161
setting up minimum and maximum controls 165
sleeping room rates, applied to an opportunity 202
sleeping rooms
about associating setup styles with suites 70
about time shifts for function spaces and sleeping rooms 265
adding product attributes 92
assigning a setup style to a function space category 64
assigning a setup style to a property and associating a package 63
associating a specific space with a category 61
associating suites with a category 70
availability logic 308
booking specific suites 312
booking suite categories 311
calculating weighted average room rates 415
canceling a suite category 313
canceling room blocks 311
complimentary room pricing 412
confirming sleeping room details 433
creating a function space category 59
creating an indivisible specific-space suite 57
creating configured space 58
creating default prices for sleeping rooms 160
creating exceptions to default prices for sleeping rooms 162
creating sleeping rooms 65
defined and characteristics 55
defining government sleeping room pricing

types and rates 162
defining setup style LOVs 63
defining sleeping room inventory controls 124
defining weekend prices 150
displaying inventory control information 125
editing inventory controls 125
editing sleeping room inventory controls 125
Function Space Diary and total sleeping room availability 382
managing as a product 91
minimum and maximum price 416
optimizing setup styles for specific spaces 65
pricing 411
pricing administration 159
pricing and room occupancy 411
pricing and the negotiation floor 415
pricing waterfall, reviewing 274
process of setting up 56
process of setting up suites for a property 68
querying inventory controls 125
scheduling a function in a specific suite 313
setting up a category for suites 70
setting up a configured specific space suite 69
setting up an indivisible specific space suite 69
setting up suite administration 70
suite pricing 416
viewing group projected and blocked availability 326
viewing SR (sleeping room) type availability 323
viewing Total Group Availability 322
weekday and weekend pricing 414

SOE (Schedule of Events)
generating and printing 478
reports 476
reports, configuring report headers 465
validating the Print Line 477

space
See function space

Spacious Set flag
about 288
configuring 301
flagging a function 301

special date 152

Special Dates button, using for a date range 324

Special Dates calendar
deleting special dates 49
setting up 49
viewing 50

special request information, gathering and confirming 435

specific space, marking as requiring backup 60

SR Type Availability, viewing 323

status indicators
defining for function spaces and assets 129
process of defining 128

subfunctions, overriding average values 278

subopportunities
generating quotes 235
recurring events 233

suite categories
about booking 311
booking specific suites 312
canceling a suite category 313
scheduling a function in a specific suite 313

suites
about associating setup styles with suites 70
assigning a setup style to a function space category 64
assigning a setup style to a property and associating a package 63
associating a specific space with a category 61
associating suites with a category 70
booking for functions 300
creating a function space category 59
creating an indivisible specific-space suite 57
creating configured space 58
creating sleeping rooms 65
defined and characteristics 55
defining setup style LOVs 63
managing suites in the Function Space Diary 394
optimizing setup styles for specific spaces 65
pricing 416
pricing administration 175
process of setting up suites 56
process of setting up suites for a property 68
setting up a category for suites 70
setting up a configured specific space suite 69
setting up an indivisible specific space suite 69
setting up suite administration 70

switching to backup space 305

synchronizing functions and function line items 442

T

taste panel, gathering and confirming function details 435

Tax Service Administration screen 23
taxes
about and process of defining 134
associating a service charge with a property 137
associating a tax code with a property 139
associating categories with products 135
associating charge codes with service charges 142
associating charge codes with tax codes 141
associating tax codes with service charges 140
charge code administration 140
creating a service charge 136
creating a tax code 139
defining charge codes 141
process of setting up 134
revenue category administration tasks 135
reviewing charge codes associated with a category 142
service charge administration 136
tax code administration 138
viewing property-specific service charges 143
viewing property-specific taxes 143
templates
post event, about 183
resume, about 183
thresholds
about profit and revenue 407
threshold calculation example 407
time interval information and turntime, defining 129
time shift information, reviewing at the quote level 320
time shifting
about for function spaces and sleeping rooms 265
performing for event functions 318
TNT PostEvent 183
TNT Resume 184
total availability
about and total availability list 324
reviewing 325
total discount
reviewing for a quote 276
viewing for an order 444
Total Group Availability, viewing 322
transactions
viewing for an account 193
translations
process of defining 128
setting up function space style translations 132
travel control assessment, adding 191
travel profile
brands, adding 189
competitors, adding 190
contact, managing 194
creating account 188
credit card spending details, adding 191
intermediary accounts, adding 190
managing account 187
travel control assessment, adding 191
trial check, generating for an event 450
turnover
completing and submitting the event turnover checklist 430
confirming sleeping room details 433
Evaluations Calendar 433
event change management 435
gathering and confirming billing information 435
gathering and confirming function details 434
gathering and confirming parking and transportation 435
gathering and confirming special request information 435
generating an agreement from a quote 428
process of confirming function space details 434
process of finalizing a quote and manager turnover 428
process of gathering and confirming event details 433
rejecting the turnover checklist 432
reviewing and accepting the turnover checklist 432
scenario 428
setting the quote status to Definite 430
submitting the turnover record to events management 432
turnover checklist
completing and submitting 430
rejecting 432
reviewing and accepting the turnover checklist 432
submitting the turnover record to events management 432
Turnover Evaluations screen 24
turntime and time interval information, defining 129

U

unit of measure conversions for function space area 301

V

validating day parts 41
visibility, for order records 445
volume discounts
about 167
aggregate volume discounts, sleeping rooms and suites 170
associating with a property 169
creating 167
line items, adding 168

W

weekday
pricing 414
property pricing 149
weekend
defining weekend prices 150
pricing 414
property pricing 149
workflow processes, activating
list of processes 29
verifying workflows are active 31