Siebel Hospitality Guide

Version 7.7
May 2004

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1 What's New in This Release

What's New in Siebel Hospitality Guide, Version 7.7

Table 1 lists changes described in this version of the documentation to support release 7.7 of the software.

Table 1. New Product Features in Siebel Hospitality Guide, Version 7.7

Topic	Description
Chapter 7, "Setting Up Inventory Controls"	This new feature displays group and transient availability by sleeping room type and queried date in a Gantt chart format.
Chapter 10, "Setting Up Pricing and Property Pricing"	This new feature allows hospitality companies to qualify an event opportunity based on the event's revenue potential.
"Using Quick Opportunity Capture" on page 123	This new feature allows the sales user to capture opportunity property, function agenda and room block information from one location.
Chapter 12, "Managing Property-Specific Event Quotes"	This new feature allows the sales user to generate quotes for selected properties as well as launch availability and pricing checks.
Chapter 13, "Working with Inventory"	This new feature allows event managers to shift the booked time for functions and sleeping rooms.
Chapter 15, "Using the Function Space Diary"	This new feature is a Gantt chart that can be used by sales representatives, event managers, and revenue managers to manage day-to-day bookings of function space and to optimize event operations.
Chapter 17, "Revenue Management"	This new feature allows for communication between the sales user and the revenue manager that a particular quote needs to be reviewed. The revenue manager can review the quote, and accept or reject changes.
Chapter 18, "Finalizing a Quote, Turnover, and Confirming Event Details"	This new feature allows the sales representative to complete a checklist to make sure certain conditions are met before turning over the event to the event execution team.

2 **Overview of Siebel Hospitality**

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

■ About Siebel Hospitality on page 16

■ Business Purposes of Screens in Siebel Hospitality on page 16

■ Viewing Information on the Hospitality Home Page (End User) on page 19

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.
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. The Function Agenda and More Info views for the Opportunities screen contain elements specific to Siebel Hospitality.
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 events 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, and the My Opportunities, My Quotes, All Orders, and All Event Checks lists.
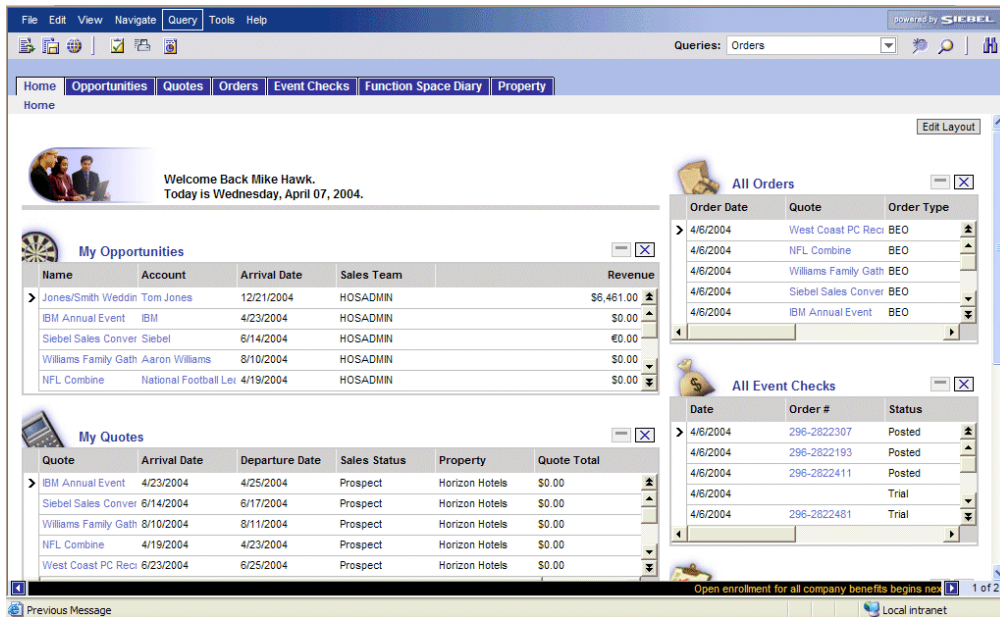
Figure 1. Siebel Hospitality Home Page

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 21

■ Hospitality Workflow Processes on page 23

■ Verifying Hospitality Workflows Are Active on page 24

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

Applications Administration Guide covers the setup tasks that are common to all Siebel eBusiness 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 *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 the *Siebel Installation Guide* for the operating system you are using. If you are upgrading, see the *Upgrade Guide* for the operating system you are using.

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 eBusiness 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 *Security Guide for Siebel eBusiness Applications*.

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 23 *Siebel Business Process Designer Administration 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.	*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" *Product Administration Guide*
Inventory Control Administration	Set up function space, sleeping room and suite inventory controls.	Chapter 7, "Setting Up Inventory Controls"
Function Space Administration	Set up a property's day parts, status indicators, and translations.	Chapter 8, "Defining Day Parts, Status Indicators and 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 9, "Setting Up Charge Codes, Taxes, and Service Charges" *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 10, "Setting Up Pricing and Property Pricing"
Create contact and account records	Define Hospitality accounts and contacts.	*Applications Administration Guide*
Set Up Proposal Generator	The proposal generator automatically creates agreement proposals from selected quotes.	*Applications Administration Guide*
Set Up Turnover Template	Use the Sales Assessment Template view to create a template for turnover tasks.	*Applications Administration Guide*

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. If this 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 Designer Administration 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 24

Administrator Setup Tasks on page 21

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 21.

To verify 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 13 workflows (*SHM*).

3 Validate that the Status field in each workflow is set to Active.

NOTE: Workflows are activated using Siebel Tools. For more information, see *Siebel Business Process Designer Administration Guide*.

Related Topic

Hospitality Workflow Processes on page 23

4 Setting Up Properties

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

Process of Setting Up Properties

The following list shows the procedures that administrators typically perform to set up properties using Siebel Hospitality. Your company may follow a different process according to its business requirements.

Administrator Procedures

To set up properties, perform the following procedures:

1 Defining Airports and Booking Centers on page 28

2 Creating Addresses for Properties on page 28

3 Adding Property Records on page 29

4 Defining Property Facilities and Room Service Attributes on page 31

5 Defining Property Day Parts on page 31

6 Updating the Property Team on page 32

7 Creating Sell Notes for a Property on page 33

8 Setting Up Special Dates for a Property on page 34

9 Viewing the Special Dates Calendar on page 34

Defining Airports and Booking Centers

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

This task is a step in Process of Setting Up Properties on page 28.

To define an airport and a booking center

1 From the application-level menu, choose Navigate > Site Map > Guest Conveniences Administration Screen.

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

■ 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 28.

To create an address for a property

1 From the application-level menu, choose Navigate > Site Map > Administration - Data > Addresses.

2 In the Addresses list, create an address record for each property, complete the fields, and save the record.

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 .

To add a property record

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, create a record, complete the required fields, and save the record.

The currency field is automatically set to USD. This value can be changed.

Click the show more button to view more fields. Some of the fields are described in the following table.

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 a recognized rating system for lodging products.
Airports	Select one or more airports from a predefined list.
Area UOM	The unit of measure that should be used for the property (square feet).
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.
Property CRS Code	The property's Central Reservation System code.
Currency	The currency used by the property.
Description	A description of the property.
Downtown Distance	The distance to the nearest retail center.

Field	Comments
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.
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.
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 *Pricing Administration Guide*.
Property	The property name.

Field	Comments
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 32.
Property Type	The type of property. For example, Resort, Extended Stay, or Meeting/Convention. The default is Corporate/Transient.
Service Level	The service level of the hotel. For example, Extended Stay, Full Service, or Limited Service.
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.
Year Built	The year the property was constructed.

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.

These tasks are a step in Process of Setting Up Properties on page 28.

To define property facilities

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property, and then click the Facilities view tab.

3 In the Facilities form, select the check boxes for each amenity at the facility.

To define room services

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property, and then click the Room Services view tab.

3 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 .

To set up day parts

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property, and then click the Day Parts view tab.

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

The table that follows 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.
Effective Start Date	The date on which the day part becomes effective. For example, 1/1/2004.
Effective End Date	The date on which the day part becomes inactive. For example, 12/31/2004.

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 .

To assign an employee to a property team

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property record, and then click the More Info view tab.

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

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

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

6 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 From the application-level menu, choose Navigate > Site Map > Property Administration.

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

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

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

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

6 Click Remove, and then click OK.

Repeat this step for each member you want to remove.

Creating Sell Notes for a Property

Sales managers can flag days as high-priority for event sales, and add sell notes to describe the sales strategy 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 Special Dates Calendar on page 34.

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 28.

To create sell notes

1 From the application-level menu, choose Navigate > Site Map > Property.

2 In the Properties list, query for the property.

3 In the property record, click the link in the Property Name field.

4 From the property form, click the Sell Notes view tab.

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

Some of the fields are described in the following table.

Field	Comments
Start Date	Start date of the sell note. Default value is the current date.
End Date	End date of the sell note. Default value is the current date.
Type	Designates the record type.
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 alerts sales representatives that the property wants additional revenue on the days. 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 .

To set up special dates

1   From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2   In the Property Pricing list, query for the property, and then click the link in the Property Name field.

3   From the property form, click the Special Dates view tab.

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

    The following table describes some of the fields.

Field	Comments
Start Date	Automatically defaults to the current date. 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 Special Dates Calendar on page 34.
End Date	End date of the special date. Defaults to the current date.
Type	Designates the type of record. Defaults to Need Sleeping Rooms. Change the type to reflect the need at the property. Options include Need Function Space, Holiday, Sell Notes, Special Events, and Sales Strategy.
Description	Description of the special date.
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   In the Special Dates list, select the date record.

2   Click Delete.

Viewing the Special Dates Calendar

The Special Dates calendar shows special dates and sell notes for a property. The user can view information in daily, weekly and monthly formats, navigate to a different date, change the calendar owner, and print the calendar.

This task is a step in .

To view the Special Dates calendar

1 From the application-level menu, choose Navigate > Site Map > Property.

2 In the Properties list, query for the property record, and click the link in the Property Name field.

3 Click the Special Dates Calendar view tab.

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

Function space represents 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 defined areas on the property grounds. Function space can have many characteristics, but during the booking process, the most important function space characteristics are:

■ The setup style

■ The minimum and maximum capacity defined for each setup style

■ The physical area measured in square feet or square meters

■ The usable area measured in square feet

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 other 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 38.
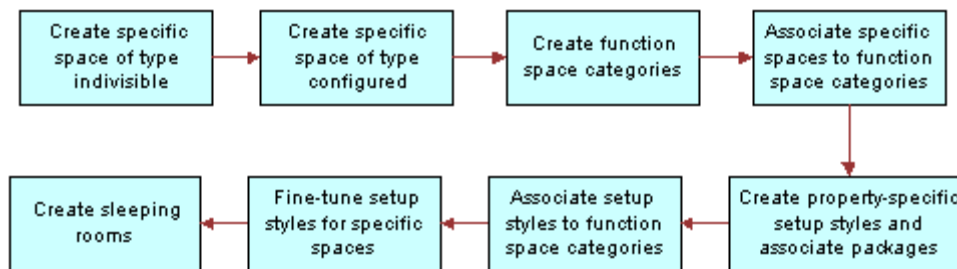
Figure 2. Function Space and Sleeping Room Administration

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

The following list shows the procedures that administrators typically perform to set up function spaces, sleeping rooms and suites using Siebel Hospitality. Your company may follow a different process according to its business requirements.

1 Creating Specific Space of Type Indivisible on page 39

Creating Specific Space of Type Indivisible

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, individual 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 38.

To set up an indivisible specific space

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property record, and then click the Specific Space view tab.

3 In the Specific Space list, create a new record, complete the appropriate fields, and save the record.

NOTE: The Category and Parent Category fields are automatically populated based on the selected 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.
Type	Indivisible or Configured specific space.
Description	The description of the specific space.
Display Sequence	The sequence a user can define for the order in which the function space would appear in the Function Space Diary.
Category	The category associated with the space. This field is automatically populated by the Sub Category field that is chosen.
Sub Category	The subcategory associated with the space.
Parent Category	The parent category associated with the space.

Creating Specific Space of Type Configured

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.

This task is a step in .

To create configured specific space

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property, and then click the Specific Space view tab.

3 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 adding specific space components, the Type field is automatically updated to Configured.

4 In the Components list, click New, select a component, and click OK.

Repeat this step to select additional components.

Creating Function Space Categories for 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 .

To create a function space category

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for a property, and then click the Category view tab.

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

The following table describes the fields. The Category and Parent Category fields are automatically populated when the Sub Category is selected.

Field	Description
Name	The name of the function space category.
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.
Category	The category associated with the space.
Sub Category	The subcategory associated with the space.
Parent Category	The parent category associated with the space.
Property Unit of Measure	The unit of measure. Read-only field displaying the value specified for the property.

Associating Specific Space to Function Space Categories

A specific space can be associated to 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 .

Related Topics

■ Creating Specific Space of Type Indivisible on page 39

■ Creating Specific Space of Type Configured on page 40

To associate specific space with a category

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property, and then click the Category view tab.

3 In the Category list, select the category.

4 Scroll down to the Specific Space view tab and click New.

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

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 *Applications Administration Guide*.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 38.

To define setup style LOVs

1 From the application-level menu, choose Navigate > Site Map > Administration - Data > List of Values.

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, 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 42

Associating Setup Styles with Function Space Categories on page 43

Optimizing Setup Styles for Specific Spaces on page 43

Creating Property-Specific Setup Styles and Associating Packages

An administrator can associate predefined setup styles to properties and then associate a package.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 38.

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

1   From the application-level menu, choose Navigate > Site Map > Property Administration.

2   In the properties list, query for the property and then click the Property Style view tab.

3   In the Property Style list, create a new record.

4   In the record, select a Setup Style and, if applicable, a Package, and save 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 38.

To assign a setup style to a function space category

1   From the application-level menu, choose Navigate > Site Map > Property Administration.

2   In the Properties list, query for the property, and then click the Category view tab.

3   In the Category list, select the category, and then scroll down and click the Setup Style view tab.

4   In the Setup Style list, create a new record.

5   In the new record, select a value in the Setup Style field.

6   Complete the remaining fields, specifying the minimum and maximum number of expected attendees for this setup style, and then save the record.

Related Topics

Defining Setup Style LOVs on page 42

Creating Property-Specific Setup Styles and Associating Packages on page 42

Optimizing Setup Styles for Specific Spaces on page 43

Optimizing Setup Styles for Specific Spaces

The setup styles associated with the 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 38.

To fine-tune a setup style for a specific space

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property, and then click the Specific Space view tab.

3 In the Specific Space list, select a record, and then scroll down and click the Setup Style view tab.

4 Update each setup style record as needed, and save each record.

Related Topics

Defining Setup Style LOVs on page 42

Creating Property-Specific Setup Styles and Associating Packages on page 42

Associating Setup Styles with Function Space Categories on page 43

Creating Sleeping Rooms

An administrator can define sleeping rooms for the property using the Property Administration screen's Sleeping Rooms view.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 38.

To create sleeping room records

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property, and then click the Sleeping Rooms view tab.

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

The following table describes some of the fields.

Field	Comments
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.
Capacity	The room capacity. The number of sleeping rooms of that type in the hotel.
Type	The sleeping room type. Options are sleeping room and suite.
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.

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.
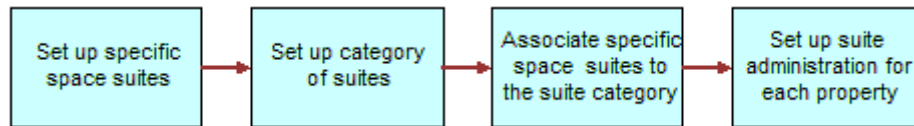
Figure 3. Suite Administration Workflow

As Figure 3 shows, when setting up suites for a property, the administrator typically performs the following tasks in order:

1 Setting Up Indivisible and Configured Specific Space Suites on page 45

2 Setting Up the Suite Category and Assigning Suite-Specific Spaces on page 46

3 Associating Setup Styles with Suites on page 46

4 Setting Up Suite Administration on page 47

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 38.

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 Function Spaces, Sleeping Rooms, and Suites on page 38.

To set up an indivisible specific space suite

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property record, and then click the Specific Space view tab.

3 In the Specific Space list, create a new record, and complete the suite information such as Name, Physical Area, and a description.

4 In the new record, select the Suite check box, and then save the record.

If the Suite check box is not visible, expose it by selecting the menu button and choosing Columns Displayed. Flagging the record as a suite helps users locate suite-specific space.

To set up a configured specific space suite

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property, and then click the Specific Space view tab.

3   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.

4   Scroll down to the Components list and click New.

5   From the Add Component dialog box, select a component, and click OK.

6   Save the records.

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 Function Spaces, Sleeping Rooms, and Suites on page 38.

To set up a category for suites

1   From the application-level menu, choose Navigate > Site Map > Property Administration.

2   In the Properties list, query for the property, and then click the Category view tab.

3   In the Category list, create a new category, and set the value in the Type field to Suite.

4   Complete the remaining fields and save the record.

To associate suites with a category

1   From the application-level menu, choose Navigate > Site Map > Property Administration.

2   In the Properties list, query for the property record, and then click the Category view tab.

3   In the Category list, select the suites category, and then scroll down to the Specific Space view tab.

4   In the Specific Space list, click New, select a suite-specific space, and 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 43.

This task is a step in Process of Setting Up Function Spaces, Sleeping Rooms, and Suites on page 38.

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 .

To set up suite administration

1 From the application-level menu, choose Navigate > Site Map > Property Administration.

2 In the Properties list, query for the property record, and then click the Suite Administration view tab.

3 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.

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:

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

Product Administration in Hospitality

Using the Product Administration screen, administrators can define product details and associate notes with the product. Product detail definition includes revenue types for reporting purposes and charge codes for tax, charge, and fee calculations. Effective start date and end dates can be used to flag discontinued products.

The Product Administration screens and views allow you to set up *complex products,* which are products containing levels of subproducts. For example, menus and packages are set up as complex products. You can define default subproduct quantities.

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. Function setup styles are set up as complex products.

Related Topic

Process of Setting Up Products and Assets

The following list shows the procedures that administrators typically perform to set up products and assets using Siebel Hospitality. Your company may follow a different process according to its business requirements.

Administrator Procedures

To set up products and assets, complete the following procedures.

1 Creating Hospitality Product Categories on page 51

2 Creating Hospitality Product Subcategories on page 52

3 Creating Simple Products for Hospitality Events on page 53

4 Creating Complex Products for Hospitality Events on page 54

5 Preparing a Simple Product Base for a Complex Product on page 55

6 Creating a Complex Product for Hospitality Events on page 55

7 Creating Generic Catering Products on page 57

8 Creating Generic Room Blocks on page 57

9 Creating Property-Specific Products on page 57

10 Mapping a Generic Catering Product to a Property-Specific Product on page 58

11 Mapping Generic Room Block to Property-Specific Room Types on page 59

12 Creating Hospitality Assets on page 59

Creating Hospitality Product Categories

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 parent categories, categories, and subcategories to organize and administer them and for revenue rollup purposes. Using Siebel Hospitality, the administrator can create new categories or add subcategories to existing categories. The administrator creates parent categories using the Administration - Data screen's List of Values (LOV) view. All function space revenues are associated with Parent Categories for revenue rollup purposes.

Siebel Hospitality includes a number of predefined categories that can be used as parent categories when defining categories. Examples of predefined 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.

For more information about working with LOVs, see *Applications Administration Guide*. For general information about categories, see *Siebel eSales Administration Guide*.

Figure 4 shows the relationship between a category, a subcategory, a product, and an asset. For each category, there can be multiple subcategories. For each subcategory, there can be multiple products. For each product, there can be multiple assets.
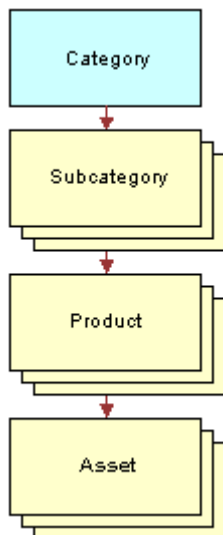
Figure 4. Relationship Between a Category, a Subcategory, a Product, and an Asset

NOTE: Category Administration within Siebel Hospitality is different from Category Administration within the standard Siebel eBusiness Applications.

This task is a step in .

To create a parent category

1 From the application-level menu, choose Navigate > Site Map > Administration - Data > List of Values.

2 In the List of Values list, create a new record, complete the fields, and save the record.

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

Repeat Step 2 for each Parent Category record.

To create a product category

1 From the application-level menu, choose Navigate > Site Map > Category Administration.

2 In the Categories list, create a record.

3 In the More Info form, name the category, select a parent category, and complete the remaining fields.

Name and Parent Category are both required fields. You may also select the Print Line Items in SOE. This field is not selected by default.

NOTE: When the Print Line Items in SOE check box is selected, items in the category are included in the Schedule of Events (SOE) report. The SOE report includes each product, except those products of type Menu and child products of a complex parent product of type Menu.

Creating Hospitality Product Subcategories

Use the Category Administration screen to create product subcategories. After product subcategories are created, the administrator can associate them with Hospitality products and charge codes.

This task is a step in Process of Setting Up Products and Assets on page 50.

To create a product subcategory

1 From the application-level menu, choose Navigate > Site Map > Category Administration.

2 In the Categories list, select the category, and then click the Sub Categories view tab.

3 In the Sub Categories list, add a record, complete the fields, and save the record.

Name is the only required field.

To create notes for categories

1 From the application-level menu, choose Navigate > Site Map > Category Administration.

2 In the Categories list, select the category, and then click the Notes view tab.

3 Designate a note type by selecting a value for Type, and then complete the Note fields.

The following fields should automatically populate:

■ Sequence

■ Created

■ Created By

NOTE: Notes are displayed under the 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. Another example of a complex product is a projector that includes simple products such as an extension cord, a lens cap, and so on. For more information about products, see *Product Administration Guide*.

The administrator uses the Product Administration screen to create simple and complex products for Siebel Hospitality. Within the product record, the Effective Start Date and Effective End Date values determine the product's availability. A product is considered discontinued if the Effective End Date has passed.

If you need to reference a complex product that has different child products associated with it, you can either:

■ Create a new complex product in Product Administration with the necessary child products.

■ Define the event requirements using simple products.

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

1 Creating Simple Products for Hospitality Events on page 53

2 Creating Complex Products for Hospitality Events on page 54

This task is a step in Process of Setting Up Products and Assets on page 50.

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 50.

To create a simple product in Hospitality

1 From the application-level menu, choose Navigate > Site Map > Product Administration.

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

The following table describes some of the fields.

Field	Comments
Name	The product name.
Part Number	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.
UoM	The unit of measure used for the product. For example, if coffee is the product, the unit of measure might be pounds.
Child Category	The subcategory for the product.
Category	This field is automatically populated after a subcategory is specified.
Parent Category	If there is a category hierarchy, the top-level category.
Property	The location of the product.
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.
Set-Up Time	Minutes needed to set up a product.
Tear-Down Time	Minutes needed to tear down a product.

Related Topics

■ See *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 Customizable Product 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

2 Creating a Complex Product for Hospitality Events on page 55

This task is a step in Process of Setting Up Products and Assets on page 50.

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 53.

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

1 From the application-level menu, choose Navigate > Site Map > Product Administration.

2 In the Products list, select the product, and then click the link in the product Name field.

3 Click the Customizable Product view tab.

4 From the menu in the Lock/Unlock Product list, choose Create Workspace.

5 In the Lock/Unlock Product list, 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 55.

To create a complex product in Hospitality

1 From the Lock/Unlock Product list, click the Product Designer link.

2 In the Product Designer list, click New.

3 In the new record, click the select button in the Product field, and select either a simple or complex product.

4 In the appropriate cardinality fields, specify the number of products the user can select (cardinality), as described in the following table.

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.

The following table describes some of the fields.

Field	Comments
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.

For more information about cardinality, see *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 Product Administration screen's Customizable Product view.

2 Click the Product Versions link.

3 Validate that cardinality for each product is entered correctly.

   a Click the Validate button.

   b Review product information.

   c If changes are required, from the Customizable Products view click the Product Designer link.

   d Make the necessary changes, and then repeat the validation process until the information is correct.

   e If no changes are required, click Done.

4 In the Lock/Unlock Product list, 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 *Product Administration Guide*.

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 50.

To create a generic catering product

1 From the application-level menu, choose Navigate > Site Map > Product Administration.

2 In the Products list, 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 50.

To create a generic Room Block

1 From the application-level menu, choose Navigate > Site Map > Product Administration.

2 In the Products list, create a new record.

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

4 Complete the remaining fields and save the record.

NOTE: Generic Room Block 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 50.

To create a property-specific product

1 From the application-level menu, choose Navigate > Site Map > Product Administration.

2 In the Products list, create a new 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.
UoM	The unit of measure used for the product. For example, if coffee is the product, the unit of measure might be pounds.
Child Category	The sub category for the product.
Category	This field is automatically populated after a subcategory is specified.
Parent Category	If a category hierarchy is involved, this is the top-level category.
Resource Type	Designates whether the product is critical, Non Critical, or General.
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.

This task is a step in .

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

1 From the application-level menu, choose Navigate > Site Map > Product Administration.

2 In the Products list, query for the generic catering product.

3 In the product record, click the link in the Name field.

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.

   NOTE: The administrator can map a generic product to a property-specific product or a common product. For a given property, a generic product can be mapped to only one property-specific product. However, the same generic product can be mapped to another property-specific product for a different property. One generic product can only be mapped to one common product.

Mapping Generic Room Block to Property-Specific Room Types

After a generic Room Block is 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 44.

This task is a step in Process of Setting Up Products and Assets on page 50.

To map a generic Room Block to a property-specific room type

1 From the application-level menu, choose Navigate > Site Map > Product Administration.

2 In the Products list, query for products of type Generic Room Block.

3 In the product record, click the link in the Name field.

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 to a specific property, and multiple assets can be associated to a single product. For example, a product called Piano can have the following assets:

■ Yamaha Piano at San Mateo property, Serial # 7896-0987

■ Wurlitzer Piano at San Jose property, Serial # Z765-9876

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

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 50.

To create an asset

1 From the application-level menu, choose Navigate > Site Map > Assets.

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

3 In the new record, click the link in the Asset # field.

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.
Property	The property where 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	Indicates the status for the asset, for example Available, Active, and so on.
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 67.

7   **Setting Up Inventory Controls**

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

- Process of Setting Up Inventory Controls on page 62
- Defining Function Space Inventory Controls on page 62
- Defining Sleeping Room Inventory Controls on page 63
- Defining Suite Inventory Controls on page 63
- Defining Out-of-Order and Unavailable Function Space at a Property on page 63

Process of Setting Up Inventory Controls

The following list shows the procedures that administrators typically perform to set up hospitality inventory controls and to designate function space as out of order or unavailable. Your company may follow a different process according to its business requirements.

Administrator Procedures

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

1 Defining Function Space Inventory Controls on page 62

2 Defining Sleeping Room Inventory Controls on page 63

3 Defining Suite Inventory Controls on page 63

4 Defining Out-of-Order and Unavailable Function Space at a Property on page 63

Defining Function Space Inventory Controls

An administrator can create inventory controls for function space categories. This procedure assumes that the administrator has already created the appropriate function space categories for the property. For more information, see Creating Function Space Categories for Property on page 41.

This task is a step in Process of Setting Up Inventory Controls on page 62.

To define function space inventory controls

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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 In the Category list, choose a category.

5 In the Rules list, create a new record and enter the Start Date and End Date for the inventory control.

   NOTE: The start and end date values are validated. Start Date must be less than or equal to the End Date plus 365.

6 In each authorization field, set the authorization levels for each day of the week, and then click Apply.

NOTE: The results of the inventory controls applied are shown in the Valid Authorizations Levels view.

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 44.

This task is a step in .

To define sleeping room inventory controls

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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 Sleeping Room list, choose a sleeping room.

6 Scroll down to the Rules list and create a new record.

7 In the Rule record, specify the Start Date and End Date for the inventory control, and set the authorization levels and optimal levels for each day of the week.

   The Start and End Date values are validated. The Start Date value must be less than or equal to the End Date plus 365.

8 Click Apply.

NOTE: The results of the applied inventory controls appear in the SR Inventory Display view.

Defining Suite Inventory Controls

Defining suites inventory control is performed in the same way as defining a function space inventory control. In this case, the administrator creates inventory controls for a suites category. For more information, see Defining Function Space Inventory Controls on page 62.

Defining Out-of-Order and Unavailable Function Space at a Property

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. The out-of-order designation is handled as a booking against the function space.

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 4-11 P.M. each day. However, the space may be available for sale at other times of the day.

Since 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.

This task is a step in .

To designate a function space as out of order

1   From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2   In the Properties list, query for the property.

3   In the property record, click the link in the Property Name field, and then click the Out of Order view tab.

4   In the Out of Order list, create a new record, and in the Function Space field, select the appropriate function space.

5   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.

To designate a function space as unavailable

1   From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2   In the Properties list, query for the property, and in the property record, click the link in the Property Name field.

3   Click the Unavailable view tab.

4   In the Unavailable list create a new record, and in the Function Space field select the appropriate function space.

5   Complete the rest of the fields, specifying the Frequency, Recurr Start Date Time, Recurr Start Time, Recurr End Date, Recurr End Time, and the reason the function space is unavailable.

6   Save the record.

8 **Defining Day Parts, Status Indicators and 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 66

- Process of Defining Day Parts, Status Indicators, and Translations on page 66

- Setting Up Property Day Parts on page 66

- Defining Function Space and Asset Inventory Status Indicators on page 67

- Defining Turntime and Time Interval Information for Function Space Display on page 67

- Defining Function Inventory and Asset Inventory Status Display Colors on page 68

- Setting Up Function Space Style Translations on page 69

Function Space Administration

The Function Space Administration screen is used to set up a property's day parts, and 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 Translations

The following list shows the procedures that administrators typically perform to administer function
space using Siebel Hospitality. Your company may follow a different process according to its business
requirements.

Administrator Procedures

To set up day parts for a property, status indicators, and translations, perform the following
procedures:

1 Setting Up Property Day Parts on page 66

2 Defining Function Space and Asset Inventory Status Indicators on page 67

3 Setting Up Function Space Style Translations on page 69

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. When the user changes the time axis in the Function Space Diary, the defined day
parts become options.

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 *Applications Administration Guide*.

This task is a step in Process of Defining Day Parts, Status Indicators, and Translations on page 66.

To set up day parts

1 From the application-level menu, choose Navigate > Site Map > Function Space Administration
> Day Part Administration.

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.
Effective Start Date	The date on which the day part becomes effective.
Effective End Date	The date on which the day part becomes inactive.
Comments	Notes for the corresponding Day Part record.

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 task is a step in .

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 teardown time in the Function Space Diary.

To define turntime and time interval information

1 From the application-level menu, choose Navigate > Site Map > Function Space Administration
> Function Space Diary Administration.

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.

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

■ Option Reserved

■ Optioned

■ Overbooked

■ Reserved

■ Reserved Shifted

■ Temporary

■ Unreserved

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

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.

To assign status colors to inventory and assets

1 From the application-level menu, choose Navigate > Site Map > Function Space Administration > Function Space Diary Administration.

2 From the FSD Administration form, 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 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 .

To set up function space setup style translations

1 From the application-level menu, choose Navigate > Site Map > Function Space Administration > Set Up Style Translation.

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.

9 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

In Siebel Hospitality, taxes are associated with properties because properties have different taxes regulated by geographic location. 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 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 events 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 and 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

The following list shows the procedures that administrators typically perform to set up charge codes, taxes and service charges using Siebel Hospitality. Your company may follow a different process according to its business requirements.

Administrator Procedures

Figure 5 illustrates the process flow for the tasks administrators typically perform to set up charge codes, taxes, and services charges. These tasks include:

- Category Administration on page 73
- Associating Categories with Products on page 73
- Tax Code Administration on page 76
- Service Charge Administration on page 74
- Charge Code Administration on page 78
- Associating Charge Codes with Tax Codes on page 79
- Associating Charge Codes with Service Charges on page 80

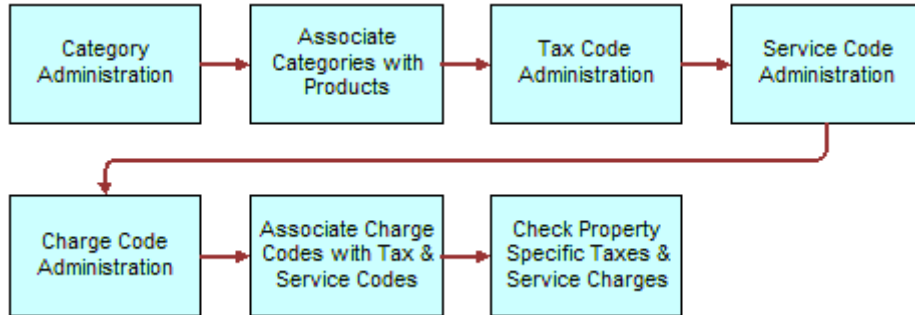■ Reviewing Property-Specific Taxes and Service Charges on page 81

Figure 5. Tax and Services Charges Administration Business Process Flow

Category Administration

During category administration, the administrator defines categories, parent categories, and subcategories. Category administration consists of the following tasks:

■ **Creating Parent Categories**. For more information on this task, see Creating Hospitality Product Categories on page 51.

■ **Creating Categories and associating the categories with parent categories**. For more information on this task, see Creating Hospitality Product Categories on page 51.

■ **Creating Subcategories**. For more information on this task, see Creating Hospitality Product Subcategories on page 52.

Associating Categories with Products

After parent categories, categories and 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 72.

To associate categories with products

1 From the application-level menu, choose Navigate > Site Map > Product Administration > Products.

2 Select a product, and in the product record, select a value in the Sub Category field.

The Category and Parent Category fields are automatically populated.

3 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 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.

Service change administration involves a two-step process:

1 Creating a Service Charge on page 74

2 Associating a Service Charge with a Property on page 75

Creating a Service Charge

Use the following procedure to define service charges for the property.

This task is performed as part of Service Charge Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To create a service charge

1 From the application-level menu, choose View > Site Map > Tax Service Admin > Service Charges.

2 In the Service Charges list, create a new record.

3 Complete the fields and save the record.

The following table describes some of the fields.

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.

4 If the service charge is taxable, click the check box in the Taxable field, and then click the Taxes view tab.

5 In the Taxes list, click New, and from the Add Taxes dialog box select the tax and 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 to a property.

This task is performed as part of Service Charge Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To associate a service charge with a property

1 From the application-level menu, choose Navigate > Site Map > Tax Service Admin > Service Charges.

2 In the list of service charges, query for the service charge and select the Properties tab.

3 In the Properties list, create a new record.

4 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 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 12/31/03 and another on 1/1/04, and a new set of taxes and service charges are effective on 01/01/04. 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.

Tax code administration involves a three-step process:

1   Creating a Tax Code on page 76

2   Associating a Tax Code with a Property on page 77

3   Associating Tax Codes to Service Charges on page 77

Related Topics

■   Generating an Event Check on page 236

■   Service Charge Administration on page 74

Creating a Tax Code

Use the following procedure to create tax codes.

This task is performed as part of Tax Code Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To create a tax code

1   From the application-level menu, choose View > Site Map > Tax Service Admin > Taxes.

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

3 Save the record.

The following table describes some of the fields.

NOTE: You can enter data in either the Amount or Percent field, but not both.

Field	Comments
Name	The name of the tax.
Currency	The currency of the tax. Defaults to the default currency of the application.
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.
Percent	The tax defined as a percentage. The amount of tax charged is the percent value multiplied by the price for the line item.

Associating a Tax Code with a Property

Use the following procedure to associate a tax code with a property.

This task is performed as part of Tax Code Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To associate a tax with a property in Hospitality

1 From the application-level menu, choose Navigate > Site Map > Tax Service Admin > Taxes.

2 In the Taxes list, query for the tax code, and then click the Properties view tab.

3 In the Properties list, click New.

4 In the Add Properties dialog box, select the property you want to associate with the tax, and then click OK.

The remaining fields should be automatically populated with the property information.

Repeat Step 3 and Step 4 until all applicable taxes are associated.

Associating Tax Codes to Service Charges

Some service charges may be taxable which requires the administrator to associate the service charge codes to the tax codes.

This task is performed as part of Tax Code Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To associate a tax code with a service charge

1 From the application-level menu, choose Navigate > Site Map > Tax Service Admin > Service Charges.

2 In the Service Charges list, query for the service charge record, and then scroll down and click the Taxes view tab.

3 In the Taxes list, click New, select the tax code and save the record.

The remaining fields should be automatically populated with the tax code information.

Repeat this step 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 category field is automatically populated when the 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 *Applications Administration Guide*.

Charge Code administration requires four procedures:

1 Defining Charge Codes on page 79

2 Associating Charge Codes with Tax Codes on page 79

3 Associating Charge Codes with Service Charges on page 80

4 Reviewing Charge Codes Associated with a Category on page 80

Related Topics

■ Service Charge Administration on page 74

■ Tax Code Administration on page 76

■ Charge Code Administration on page 78

■ Reviewing Property-Specific Taxes and Service Charges on page 81

Defining Charge Codes

Perform the steps in the following procedure to define charge codes.

This task is performed as part of Charge Code Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To define a charge code

1 From the application-level menu, choose View > Site Map > Tax Service Admin > Charge Codes.

2 In the Charge Codes list add a record, and then 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
Category	A group of related products. This field is automatically populated when you enter the subcategory.
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.
Sub Category	A subcategory allows you to group products more precisely within a larger category and assign different taxes to each subcategory. For example, Appetizers can be a subcategory of the 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 performed as part of Charge Code Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To associate a tax with a charge code

1 From the application-level menu, choose Navigate > Site Map > Tax Service Admin > Charge Codes.

2 In the Charge Codes list, query for the charge code, and then click the Taxes view tab.

3 In the Taxes list, click New.

4 In the Add Taxes dialog box, select the tax you want to associate with the charge code, and click OK.

5 Save the record.

The remaining fields should be automatically populated with the property information.

Repeat Step 3 and Step 4 for each tax 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 performed as part of Charge Code Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To associate a charge code with a service charge

1 From the application-level menu, choose View > Site Map > Tax Service Admin > Charge Codes.

2 In the Charge Codes list, query for the charge code and click the Service Charges view tab.

3 In the Service Charges list, click New.

4 In the Add Service Charge dialog box, select the service charge you want to associate with the charge code.

The remaining fields should be automatically populated with the property information.

Repeat Step 3 and Step 3 for each tax you want to associate with the charge code.

Reviewing Charge Codes Associated with a Category

After setting up all the charge codes, perform the following steps to view the charge code associations to each category using the Category Administration view.

This task is performed as part of Charge Code Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To review charge codes associated with a category

1 From the application-level menu, choose Navigate > Site Map > Category Administration.

2 In the Categories list, query for the category and then click the Charge Codes tab.

The Charge Codes list displays all the charge codes associated with the 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 73.

This task is performed as part of Charge Code Administration, which is a step in Process of Setting Up Charge Codes, Taxes, and Service Charges on page 72.

To view property-specific taxes

1 From the application-level menu, choose Navigate > Site Map > Property.

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 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 From the application-level menu, choose Navigate > Site Map > Property.

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 Service Charges tab.

The Service Charge list displays all the service charges associated with the property record.

NOTE: This is a read-only view.

10 Setting Up Pricing and Property Pricing

This chapter describes administrator procedures for pricing setup of products and properties. it includes the following topics:

Process of Setting Up Pricing and Property Pricing

The following list shows the procedures that administrators typically perform to set up pricing for products and properties using Siebel Hospitality. Your company may follow a different process according to its business requirements.

Administrator and Revenue Manager Procedures

To administer product and property pricing, perform the following procedures:

1 Setting Up Price Lists on page 85

2 Creating a Property Pricing Profile on page 87

3 Sleeping Room Pricing Administration on page 88

4 Setting Up Rates for Different Sleeping Rooms on page 89

5 Defining Government Sleeping Room Pricing Types and Rates on page 91

6 Setting Up the Negotiation Floor Rate and Exceptions on page 92

7 Defining Weekend Prices on page 94

8 Setting Up Pricing Day Parts on page 95

9 Defining Function Space Pricing Types and Rental Fees on page 95

10 Defining a Profit Series and Percentages on page 96

11 Defining Function Space Threshold Pricing on page 97

12 Setting Up Average Values and Function Types on page 99

13 Setting Up Sleeping Room Costing Data on page 100

14 Setting Up Profit Series for Categories on page 101

15 Setting Up Profit Thresholds on page 101

16 Price Lists and Catering Products on page 101

17 Setting Up Arrival Date Adjustments for Product Pricing on page 101

18 Setting Up Account and Segment Discounts on page 102

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.

■ **Corporate Revenue Mangers.** 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 a variety of uses, for example by property (such as a hotel price list), by account, by product type (for example audiovisual), and time of year (Spring Break price list).

Orders are typically associated with the property's default price list; however, each order can be associated with a different price list if desired.

Administrators can define numerous price lists using the Price List view. For simple products, the administrator can define a unit price. For complex products, the administrator defines the unit price and allocated prices. Products can be marked as nondiscounted, meaning that no discounts can be applied to the product.

This task is a step in .

To create a price list

1 From the application-level menu, choose Navigate > Site Map > Pricing Administration.

2 In the Price Lists list, create a new record.

3 In the new record, complete the fields and save the record.

The following table describes some of the fields.

Field	Comments
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.
Last Updated	The date the record was last updated.
Price List	The name of the price list.
Organization	The organization associated with this price list.
Pricing Model	The pricing model associated with the price list. Only one pricing model can be linked to this price list (at the header data level) at a time. The model's effective dates must fall within the effective dates of the price list for the model to be effective.
Updated By	The login ID of the person who last updated the record.

4 Select the new price list record and then click the Price List Line Items view tab.

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 53.

6 Provide information in the remaining fields of the Price List Line Items list.

For descriptions of these fields, see *Pricing Administration Guide*.

Repeat Step 5 through Step 6 for each product you want to add.

For general information about price lists, see *Pricing Administration Guide*.

NOTE: A sample pricing model has been included in the Siebel Hospitality sample database. You can build your own pricing model based on this sample, and then attach it to each price list you create. To use the sample pricing model, navigate to Pricing Administration > Pricing Model. You must reload the pricing model each time the server is restarted.

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:

■ Creating a Property Pricing Profile

■ Sleeping Room Pricing Administration

■ Function Space Pricing Administration

■ Costing and Profitability Administration

■ Discount Pricing Administration

■ Suite Pricing Administration

Figure 6 illustrates this business process flow.
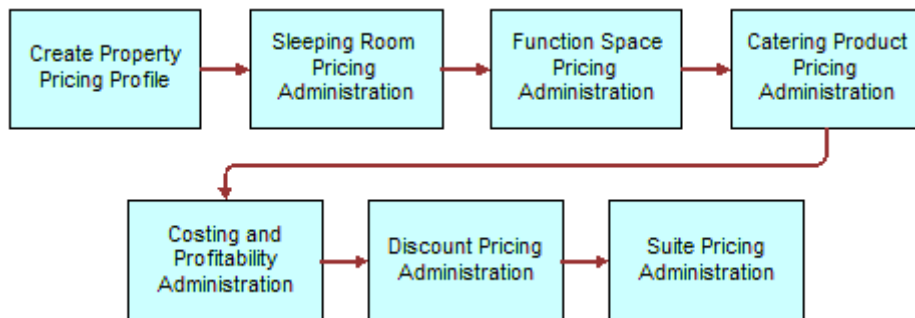
Figure 6. Property Pricing Administration Business Process Flow

Creating a 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:

■ Non Participating

■ Weekend/Weekday

■ Price Lists

Non Participating Properties Pricing

Non Participating 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 non participating properties.

For a non participating property, availability and pricing checks are bypassed during the generate quote process.

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 .

To create a property pricing profile

1   From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2   In the Property Pricing list query for the property record.

3   In the property record, set the values for the pricing parameters:

■   Non Participating

■   Weekend/Weekday

■   Currency

■   Price List

Sleeping Room Pricing Administration

Each property administrator typically sets up the property-specific benchmark rates for each of the different room types defined for the property. The defined rates apply to the sleeping room types when the active flag is set. Exceptions to the established rates are typically used to adjust arrival day pricing and pricing exceptions on certain days of the week. When defining exception rates, the exception flag must be set in the sleeping room type record, or the benchmark rate is used. It is not possible to define an exception for a day that is not in the effective date range specific to a room type.

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 line item in a price list, 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. There are seven benchmark prices for each room type representing individual benchmark prices for each day of the week. Additional adjustments to the benchmark prices are implemented using matrix-based pricing factors that outline pricing adjustments such as price overrides, price markup, discount amount, discount %, and % mark up.

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 Different Sleeping Rooms on page 89

   a Creating Default Prices on page 89

   b Creating Exceptions to Default Prices on page 90

2 Defining Government Sleeping Room Pricing Types and Rates on page 91

3 Setting Up the Negotiation Floor Rate and Exceptions on page 92

4 Defining Weekend Prices on page 94

Setting Up Rates for Different 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 performed as part of Sleeping Room Administration, and is a step in Process of Setting Up Pricing and Property Pricing on page 84.

Creating Default Prices

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 prices

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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 Sleeping Room Pricing Type view tab.

5 In the Sleeping Room Pricing Type list, add a record.

6 Complete the necessary fields, and save the record.

The Start Day and End Day fields are automatically populated based on the Effective Start Date and Effective End Date.

Some of the fields are described in the following table.

Field	Comments
SR Type	Type of sleeping room.
Description	Automatically populated if a description of the sleeping room type exists.
Exception	When selected, indicates an exception to the benchmark rate for the sleeping room type is defined. If you create a new record and do not click the exception flag, the new record overrides any previous benchmark rate for the day.
Effective Start Date	Effective date for the exception. The exception flag must be set.
Effective End Date	End date of the exception, if the record is flagged as an exception.
Active	When selected, indicates the benchmark rate, or the exception, is active.

7 Scroll down to the Sleeping Room Rates list.

8 Complete the Rate field for each Day of Week record.

The following table describes some of the fields.

Field	Comments
Day	Automatically populated with the days of the week.
Price/Rate	The defined benchmark or exception rate.
Currency	Automatically populated, based on the currency set for the property.

9 Save the records.

Creating Exceptions to Default Prices

The administrator can define exception rates for each sleeping room type for each day of the week.

To create exception pricing

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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 Sleeping Room Pricing Type view tab.

5 In the Sleeping Room Pricing Type list, add a record, click the Exception flag field, and complete the remaining fields.

6 Scroll down to the Sleeping Room Rates view.

7 Complete the Rate field for each Day of Week record, and save each record.

Defining Government Sleeping Room Pricing Types and Rates

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.

A government rate is only given to a group if the pricing is available each day of the particular week for the time the group is at the property. If government pricing is closed for a single day during the room block period, then the entire room block does not qualify for 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. The sleeping room rates are defined in advance of that period, and the Open flag is not selected until the period arrives.

When defining open government rate exceptions for a particular day of the week, the administrator can create a Sleeping Room Pricing Type flagged as an exception with the Open flag selected. When an exception is flagged as open, all of the Operational flags are automatically set for defined rates in the Government Sleeping Room Rate list, indicating that the exception is true for all the days of the week. If the administrator only wants the exception to be applied to selected days such as Mondays and Tuesdays, the administrator deselects the operational flags for all other days.

This task is performed as part of Sleeping Room Administration, and is a step in .

To set up government rates

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2 In the Properties list, select the property.

3 In the property record, click the link in the Property Name field.

4 Click the Government Sleeping Room Pricing Type view tab.

5 In the list, create records for the sleeping room pricing types.

6 In each Sleeping Room Pricing Type record, select the Open check box, if the rate is available.

7 In the Government Sleeping Room Rates list, define the rate for each sleeping room type for each applicable day of the week.

Select the Operational check box for those days of the week for which the rate applies.

Setting Up the Negotiation Floor Rate and Exceptions

Although the sales representative has some flexibility when negotiating the sleeping room rate with the customer, the sales representative cannot negotiate prices that are lower than the predefined pricing parameter, which is called the *Negotiation Floor.*

The user can set the negotiation floor's discount percentage or dollar amount by start and end dates and by product. The negotiation floor price is applied after all of the pricing rules are applied. Exceptions can also be defined. When defining exceptions to the Negotiation Floor, the range of dates within which the negotiation floor exception is applicable must be defined. For example, at a San Francisco hotel, between the dates of 1/1/04 and 1/31/04, $20 flexibility is allowed on the price of a standard room.

The following equation shows the relationship between the minimum room price and negotiation floor:

Negotiation Floor = Max (Minimum Price, Negotiation Floor)

This task is a step in .

Defining the Negotiation Floor Rate

The Negotiation Floor rate is set for each room type within a property for each day of the week and can be defined in terms of a flat dollar amount or a percentage amount.

To set up the negotiation floor

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2 In the Properties list, select the property and then click the link in the Property Name field.

3 Click the Negotiation Floor view tab.

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

Some of the fields are described in the following table.

Field	Comments
Adjustment Type	The adjustment type such as Discount Amount, % Discount, and so on.
Adjustment Value	The adjustment value.
SR Type	The sleeping room type for the property.

Defining Exceptions to the Negotiation Floor

You can define exceptions to the negotiation floor for each sleeping room type. Exceptions can be activated when needed.

To define negotiation floor exceptions

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2 In the Properties list, select the property and then click the link in the Property Name field.

3 Click the Negotiation Floor view tab.

4 In the Negotiation Floor list, select the sleeping room type record.

5 In the Negotiation Exceptions list create a new record and complete the fields.

The following table describes some of the fields.

Field	Comments
Start Date	The start date for the negotiation floor exception.
Start Day	Automatically populated based on the start date.
End Date	The end date for the negotiation floor exception.
End Day	Automatically populated based on the end date.
Adjustment Type	The exception adjustment type such as % Discount and Discount amount.
Adjustment Value	The value of the exception adjustment.
Frequency	The frequency of the exception, for example Mon., Tues.
Active	Check box that indicates the exception is active.

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 weekend 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 84.

To define weekday and weekend days

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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.

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 using the Function Space Pricing Types list and the Function Space Rental fees list. The rental fees for each function space type may be adjusted according to the day of the week, the day part, as well as seasonal pricing variations. 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 are applied to specific space associated with the category. Prices for specific space can be later modified, 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 Types and Rental Fees

3 Defining a Profit Series and Percentages

4 Defining Function Space Threshold Pricing

5 Setting Up Average Values and Function Types

Setting Up Pricing Day Parts

Before the Function Space Diary can be used, either the administrator or the property revenue manager must segment the operational day into periods of time, and then set up the day parts for the diary. To set up day parts for the property, see Defining Property Day Parts on page 31.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 84.

Defining Function Space Pricing Types and Rental Fees

The user can define benchmark rental fees for function space room types and define pricing exceptions using the Function Space Pricing Type list and the Function Space Rental Fees list.

The rental fees for each function space type may be adjusted according to the day of the week and the day part, as well as seasonal pricing variations. The property administrator must set up the defaults for daily rentals and then define any day part exceptions.

The administrator can define function space type prices at the category level, and the prices are applied to specific space associated with the category. Prices for specific space can be later modified, if necessary. If categories are not defined, the administrator defines prices for specific space.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 84.

To define function space types and rental fees

1   From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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

3   Click the Function Space Pricing Types view tab.

4   In the Function Space Pricing Types list create a new record, complete the fields, and save the record.

The following table describes some of the fields.

Field	Comments
Function Space	Function Space defined for the property.
Type	Automatically populated based on the selected function space.
Exception	Indicates whether the record is the default benchmark rental or an exception to the default rental fee.
Start Date	The start date of the exception. It is recommended that the user complete this field when the record is flagged as an exception.
End Date	The end date of the exception. It is recommended that the user complete this field when the record is flagged as an exception.
Active	Indicates whether or not the function space pricing is available for use.

5 With the Function Space Type record selected, scroll to the Function Space Rental Fee list, and update the Rental field for each rental fee record.

6 Save the records.

To define Function Space Type exceptions

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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

3 Click the Function Space Pricing Type view tab.

4 In the Function Space Type list, create a new record, select the Exception check box, and complete the remaining fields.

5 Scroll down to the Function Space Rental Fee list, and update the Rental field for each rental fee exception.

6 Save the records.

Defining a Profit Series and Percentages

The administrator or revenue manager can define a Profit Series that manages different profit percentages for different periods. 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 84.

To define a profit series with percentages

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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 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 to the Profit Percentage list, query for a Parent Category, and enter a value in the Profit Percentage field of the record.

Repeat this step to add parent categories and percentages.

Defining Function Space Threshold Pricing

Some hospitality companies only accept function space business when an event on their properties meets a required revenue amount. This profit threshold is used to qualify an event opportunity based on the event's revenue potential. If the event brings in the required threshold profit, the event can be booked by the sales team without the intervention of the revenue manager.

Thresholds are only defined for function space by day and day part. Thresholds indicate how much profit needs to be made to complete the booking. The quote profit must be compared with the threshold defined for the function space for the indicated time period. Thresholds are defined for a specific date range.

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.

The threshold should be calculated only when every function is associated with a function space, so that there is no partial threshold to be calculated.

Use the Property Pricing Administration screen's Threshold view to define function space threshold pricing for each day of the week and the parts of a day. The thresholds are set up for function space revenue only and do not include the sleeping room revenue.

NOTE: You must define the day parts before you can define thresholds and use the Function Space Diary. For more information, see Defining Property Day Parts on page 31.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 84.

To define a threshold and threshold values

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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

3 Click the Threshold view tab.

4 In the Threshold list, add a record, and in the record click the select button in the Function Space field to choose a predefined function space.

5 Complete the remaining fields and save the record.

The following table describes some of the fields.

Field	Comments
Function Space	The Function Space defined for the property.
Exception	Indicates whether this record is the default benchmark rental or an exception to the default rental fee.
Start Date	The date the exception is effective. If this is an exception, it is recommended that the user enter a value for this field.
End Date	The end date of the exception. If this is an exception, it is recommended that the user enter a value for this field.
Active	Indicates whether or not the function space pricing is available for use.

When the Threshold record is saved, the Threshold Value list is populated with Days and Day Parts.

6 In the Threshold Value list, enter a threshold value for the Day Parts associated with each day of the week.

To define a threshold exception

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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

3 Click the Threshold view tab.

4 In the Threshold list, add a record, and then, in that record, click the select button in the Function Space field to choose a predefined function space.

5 In the Threshold record, select the Exception check box, complete the remaining fields and save the record.

When the Threshold record is saved, the Threshold Value list is populated with Days and Day Parts.

6 In the Threshold Value list, enter a threshold exception value for the Day Parts associated with the applicable day of the week.

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 are set up globally in the list of values (LOV) through the LOV Administration view, and then every property can choose a subset of the list of values using the Property Pricing screen.

This task is a step in .

To set up function types and average values

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2 Select the property record, and click the link in the Property Name field.

3 Select the Function Types view tab, and create a new record.

4 Complete the following fields based on the function type:

■ Name

■ Active

NOTE: The Description field is automatically populated with the value from the Name field. Modify the Description field as appropriate.

5 Scroll down to the Type - Applicability Time list and create a new record.

6 Complete the following fields:

■ Business Type

■ Start Date

■ End Date

NOTE: The Start Day and End Day is automatically populated with the values from Start Date and End Date.

7 Scroll down to the Average Values list and choose either Category or Parent Category to create new average value records.

8 For each record in the average values list, update the following fields:

■ Average Value

■ UoM

■ Service Charge %

Costing and Profitability Administration

Property revenue managers must perform the costing and profitability setup. This process includes the following tasks:

1 Setting Up Sleeping Room Costing Data on page 100

2 Setting Up Profit Series for Categories on page 101

3 Setting Up Profit Thresholds on page 101

Setting Up Sleeping Room Costing Data

Revenue Managers can define the costs associated with each sleeping room type at the property. The values entered in the Sleeping Room Costs view 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.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 84.

To set up sleeping room costing data

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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

3 Click the Sleeping Room Costs view tab.

4 In the Sleeping Room Costs list, create a record and complete the fields.

Some of the fields are described in the following table.

Field	Comments
SR Type	The type of sleeping room.
Effective Start Date	The date that the cost is effective.
Effective End date	(Optional) The date that the cost no longer applies.
Cost Type	Read-only field. Defaults to the Price Override value.
Cost	The cost of the sleeping room.

Setting Up Profit Series for Categories

For more information on setting up profit series for categories, see the Function Space Pricing Administration topic Defining a Profit Series and Percentages on page 96.

Setting Up Profit Thresholds

For more information on setting up profit thresholds, see the Function Space Administration topic, Defining Function Space Threshold Pricing on page 97.

Discount Pricing Administration

Catering Products Pricing Administration typically involves three elements that must be addressed:

- Price Lists and Catering Products on page 101
- Setting Up Arrival Date Adjustments for Product Pricing on page 101
- Setting Up Account and Segment Discounts on page 102

Price Lists and Catering Products

Price lists generally contain the first prices a buyer sees, before any pricing adjustments take place. A product must be assigned to a price list in order for a base price to appear within the quote, so the price list is one of the requirements for a product's full visibility within the quote. Each property should have its own price list to help maintain products and prices at the property level. Price lists can be transformed from one currency into another.

Price lists are created with a minimum, maximum, and list price for each listed catering product. After the price list is set up, it is associated to the property. For more information about price lists, see Setting Up Price Lists on page 85.

Setting Up Arrival Date Adjustments for Product Pricing

Property Revenue managers can set up prices for catering products based on the group's arrival date. The user specifies the start date, end date, adjustment type, and adjustment amount in the Matrix Discount Pricing view. Discounts are then calculated based on the group's arrival date and the matrix discount pricing.

This task is a step in Process of Setting Up Pricing and Property Pricing on page 84.

To set up a matrix discount pricing

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

2 In the Properties list, select the property record and then click the link in the Property Name field.

3 Click the Matrix Discount Pricing view tab.

4 In the Matrix Discount Pricing list, add a record and complete the fields based on the discount type.

Setting Up Account and Segment Discounts

Account rules are pricing adjustments that are met when certain accounts are specified within a quote or an order. Account pricing rules apply to a product line and include an adjustment type, adjustment value, start date, and end date.

If different accounts have distinct prices, then multiple pricing rules may need to be set up. The account rules can be based on account or parent account.

Segment rules are pricing adjustments that are applied when certain segments are identified for a quote or an order (for example, a segment defined as Corporate may get a special discount rate). Segment pricing rules, which are date-range specific, apply to a product line and include an adjustment type, adjustment amount, start date and end date.

Use the following procedure to define account and segment discounts under the Matrix Series view. This task is a step in Process of Setting Up Pricing and Property Pricing on page 84.

To set up account and segment discounts

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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

3 Select the Matrix Series view tab.

4 In the Matrix Series list select an existing Matrix Series, or create a new one.

5 Scroll down to the Price Details list, add a record and complete the fields.

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.

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 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.

Related Topics
Function Space Pricing Administration on page 94

11 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

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.

End-User Procedures

To manage opportunities for an event, perform the following tasks:

1 Profiling the Event Customer Account on page 106

2 Creating Hospitality Event Opportunities on page 107

3 Adding Details to the Event Opportunity on page 110

4 Modifying the Opportunity Arrival Date on page 110

5 Adding Activities to an Event Opportunity on page 111

6 Adding a Function Agenda and Line Items to an Event Opportunity on page 113

7 Adding a Function Agenda to an Event Opportunity on page 113

8 Adding Function Agenda Line Items to an Event Opportunity on page 115

9 Using Function Agenda Buttons When Defining an Opportunity Function on page 116

10 Adding Room Block Information to an Event Opportunity on page 118

11 Adding General Billing Information to an Event Opportunity on page 120

12 Selecting Properties for the Event Opportunity on page 122

13 Using Quick Opportunity Capture on page 123

14 Adding an Assessment to the Event Opportunity on page 124

Profiling the Event Customer Account

When the customer contacts the 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. The account and contact are associated with the event opportunity when it is created.

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 the account is not found, create an account record. For more information about creating and managing accounts, see *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 *Applications Administration Guide*.

■ **Opportunity More Info form.** In the Account and Contact Information section of the form, click the select buttons in the Account and Last Name fields, and then query for the account or contact. If the account or contact is not found, create the records.

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 106.

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.
	Revenue	The total rolled up amount from the projected property revenue.
	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.
	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. You can set and change the arrival date by clicking Modify Arrival Date from the Opportunity form.
	# of Days	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.
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.

Section	Field	Comments
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.
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.
Capacity Requirements	Peak # Function Spaces	The number of function spaces required during the event's peak periods.
	Total # Nights	Read-only. The total number of nights allocated to the opportunity.
	Peak # Attendees	The maximum number of attendees expected for the event.
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).
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.
	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.

Section	Field	Comments
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.
Discount Information	Discount %	The discount percent value that the sales representative is giving to the customer. Proposed discounts should be added in the Notes view, as entering a value in this field automatically applies the discount to the quote.

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, other details, such as property-specific information, event preparation activities, and preliminary documents and notes, can be associated with the opportunity and assessed by the event planning team.

This section includes the following topics, and is a step in Process of Capturing Hospitality Opportunities on page 106.

- Modifying the Opportunity Arrival Date on page 110
- Adding Activities to an Event Opportunity on page 111
- Adding Attachments to an Event Opportunity on page 112
- Adding Notes to an Event Opportunity on page 112

Modifying the Opportunity Arrival Date

If necessary, users can change the arrival and departure date information, or remove the arrival date information when necessary for an opportunity.

To modify the arrival date in an opportunity

1 Navigate to the Opportunities screen > Opportunity List view.

2 In the Opportunities list, query for the opportunity.

3 In the Opportunity form, click Modify Arrival Date.

4 In the Enter/Change Arrival Date dialog box, select a new arrival 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.

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 Modify Arrival Date.

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.

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 *Applications Administration Guide*.

This task is a step in .

To associate activities with an event opportunity

1 Navigate to the Opportunities screen > Opportunity 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 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 Process of Capturing Hospitality Opportunities on page 106.

To add attachments to the Event Opportunity

1   Navigate to the Opportunities screen > Opportunity 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, 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 > Opportunity 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, only accessible by the creator, or public, accessible by the entire events planning team.

This task is a step in Process of Capturing Hospitality Opportunities on page 106.

To add notes to an opportunity

1   Navigate to the Opportunities screen > Opportunity 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 Notes view tab, and then click the Public or Private 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 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.

Since 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 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 hospitality event.

This section includes the following topics, and is a step in Process of Capturing Hospitality Opportunities on page 106.

■ Adding a Function Agenda to an Event Opportunity on page 113

■ Adding Function Agenda Line Items to an Event Opportunity on page 115

■ Using Function Agenda Buttons When Defining an Opportunity Function on page 116

Adding a Function Agenda to an Event Opportunity

The Functions Agenda list includes special functionality buttons that you can use to build function hierarchies, and flag functions to be bypassed during the availability check. For more information, see Using Function Agenda Buttons When Defining an Opportunity Function on page 116.

This task is a step in Process of Capturing Hospitality Opportunities on page 106.

To enter a function agenda from the Opportunity screen

1 Navigate to the Opportunities screen > Opportunity 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 In the Function Agenda list, add a 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.
Setup Style	The setup style for the function. Setup styles that have been defined as universally available appear in the list.
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 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.
Meal Period	The meal period associated with the function.
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.
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.

Field	Comments
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.

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 Process of Capturing Hospitality Opportunities on page 106.

To specify function agenda line items

1 Navigate to the Opportunities screen > Opportunity 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	The agenda line item name. For example, coffee, soft drinks and a table.
Product Type	Automatically defined when the item is selected. For example, Generic.
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).

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 Process of Capturing Hospitality Opportunities on page 106.

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.

To create a function hierarchy

1   Navigate to the Opportunities screen > Opportunity 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

Copy function speeds up the event agenda creation process by allowing the user to use the work completed for previous functions. If another function has many of the same characteristics as the newly desired function, the user can duplicate a function and then edit it to reflect the new function's unique needs (for example keeping some of the function's line items, adding new line items, and deleting 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 > Opportunity 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   Select the function in the list 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, the subfunctions are automatically copied. If the subfunction check box is not selected, only the function and the line items associated with the function are copied.

If then you 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. The function is associated with the original function's opportunity. You can choose another opportunity if desired.

You can 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.

To copy multiple functions at the same time

1 Navigate to the Opportunities screen > Opportunity 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 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.

6 Update the fields in the new record.

Using the Bypass Button Flag to Skip Availability and Mapping to Function Space

When defining a tentative function agenda, the sales representative can use Bypass to skip the following automatic processes:

■ Function space availability and mapping to property-specific function space

■ Sleeping Room availability

In the Function Agenda view, Bypass can be used to skip the availability process at the individual function level.

When Bypass is used, the following pricing processes do not occur:

■ The function space room rental is not determined for the function.

■ The required threshold is not calculated for the function.

■ The required threshold for the quote is not calculated.

Average values are only calculated when the function type and average values are defined for the property.

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 137.

This task is a step in Process of Capturing Hospitality Opportunities on page 106.

To enter room block information

1 Navigate to Opportunities screen > Opportunity List view.

2 In the Opportunities list, query for the opportunity.

3 In the Opportunity record, click the link in the Opportunity # field.

4 In the Room Blocks form, complete the fields in the sections.

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 quad rooms.
Billing Group	The group responsible for paying the bills. Associated billing group information that can be added includes the billing group name and billing method, contact's phone number, address, fax number, and so on. The user can select an existing billing group, or create a new billing group.
Commission Amount	The commission amount specified for the group room block.

Field	Comments
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.
Commission %	The commission percent applied to the group room block. You can specify a Commission Amount or a Commission %, but not both.
Room Notes	Special requests such as room rates and other room block details.

5 In the Room Blocks list, create a record and complete the fields.

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	Read-only. Automatically calculated based upon the date.
Room Type	Room types for each room block line item. These rooms are of type generic room block.
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. This value must be entered if the room block item is copied.
Complimentary	The number of complimentary rooms for each room block line item.

Deleting a Room Block line item

1 Navigate to the Room Blocks view.

2 In the Room Blocks list, select the record.

3 Click Delete.

Copying Room Block line items

1 Navigate to the Room Blocks view.

2 In the Room Blocks list, select the room block item.

3 Click Copy.

4 Modify the values in the Copy Room Block form, and then click Copy.

A value must be entered in the Blocked field to copy the room block record.

Reservation Type and Method Definitions

Table 5 describes the available reservation types and methods available when defining a Billing Group in the Opportunity Room Blocks view.

Table 5. Reservation Type and Method Definitions

Reservation Type and Method	Field	Comments
Reservation Type	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.
Reservation Method	Rooming List	A rooms required list 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.
	Housing Agency	An intermediate agency handles the booking of the group's room blocks.

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 which 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 106.

To add event billing information to an opportunity

1   Navigate to the Opportunities screen > Opportunity 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 Click the Billing Information view tab, and complete the fields in the form.

The following table describes some of the fields.

Field	Comments
Account Bill to	For more information, see How Bill-to Information Is Used in the Event Sales Process on page 121.
Contact Bill to	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.
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.
Amount Received	The amount of the deposit received.
County Tax Exempt #	County Tax Exempt number.
County Applicable	Indicates the applicable county.
Fed Tax Exempt #	The Federal Tax Exempt number.
City Tax Exempt #	The City Tax Exempt number.
City Applicable	Indicates the applicable city for taxation.
State Tax Exempt #	State Tax Exempt number.
State Applicable	Indicates the applicable state for taxation.
Tax Exempt	If the flag is selected, it indicates tax exempt status.
Tax Exempt Approved	If selected, it indicates the tax exempt status is approved for the event.
Payment Method	Method that is used to make the payment. For example, a cashier's check.

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 106.

To record multiple deposits for an event

1 Navigate to the Opportunities screen > Opportunity List view.

2 From the Opportunities list, query for the opportunity.

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, click New, complete the fields, and click Save.

Repeat this procedure to record each deposit payment.

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 an appropriate property is identified, the sales representative can add the property to the Opportunity Properties list. If only general attributes are specified by the customer, then the sales representative searches for a property that meets the requirements. The search query can be filtered to meet the property need date.

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 129.

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 Process of Capturing Hospitality Opportunities on page 106.

To add a property to an opportunity

1 Navigate to the Opportunities screen > Opportunity 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 Properties view tab.

5 In the Properties list, click New, 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, click the Primary field to designate the primary property.

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

■ Function Agenda information

■ Room Block information

This task is a step in Process of Capturing Hospitality Opportunities on page 106.

To capture property information

1 Navigate to the Opportunities screen > Opportunity 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 Capture view tab.

5 In the Capture list, click New, select the property, and complete the fields.

6 Scroll down to the Room Blocks list, create a new Room Block record, and complete the fields.

You can click Copy to duplicate and modify an existing room block. Click the link in the Day # field to navigate to the Opportunity Room Blocks view to add details.

7 In the Agenda Functions list, create a new agenda record and complete the fields.

You can click Copy to duplicate and modify existing agenda items. Click the link in the Day # field to navigate to the Opportunity Function Agenda view.

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 106.

To add an assessment to an opportunity

1 Navigate to the Opportunities screen > Opportunity 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 Assessments view tab.

5 In the Assessments list, create a new record.

6 In the new record, click the select button in the Template Name field, and select a predefined assessment template from the list.

For more information about creating assessment templates with predefined attributes, see *Applications Administration Guide*.

7 Scroll down to the Assessment Attributes list, and 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.

12 Managing Property-Specific Event Quotes

This chapter describes the procedures that events managers and operations personnel use to generate property-specific quotes for an event opportunity using Siebel Hospitality software. It includes the following topics:

The procedures in should be completed before the procedures in this chapter are performed.

About Property-Specific Quotes

When the event sales representative generates a quote for each property that meets the requirements of the event, this action marks the transition between the opportunity phase of event planning to the quote phase.

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 7 shows an example of a typical process flow.
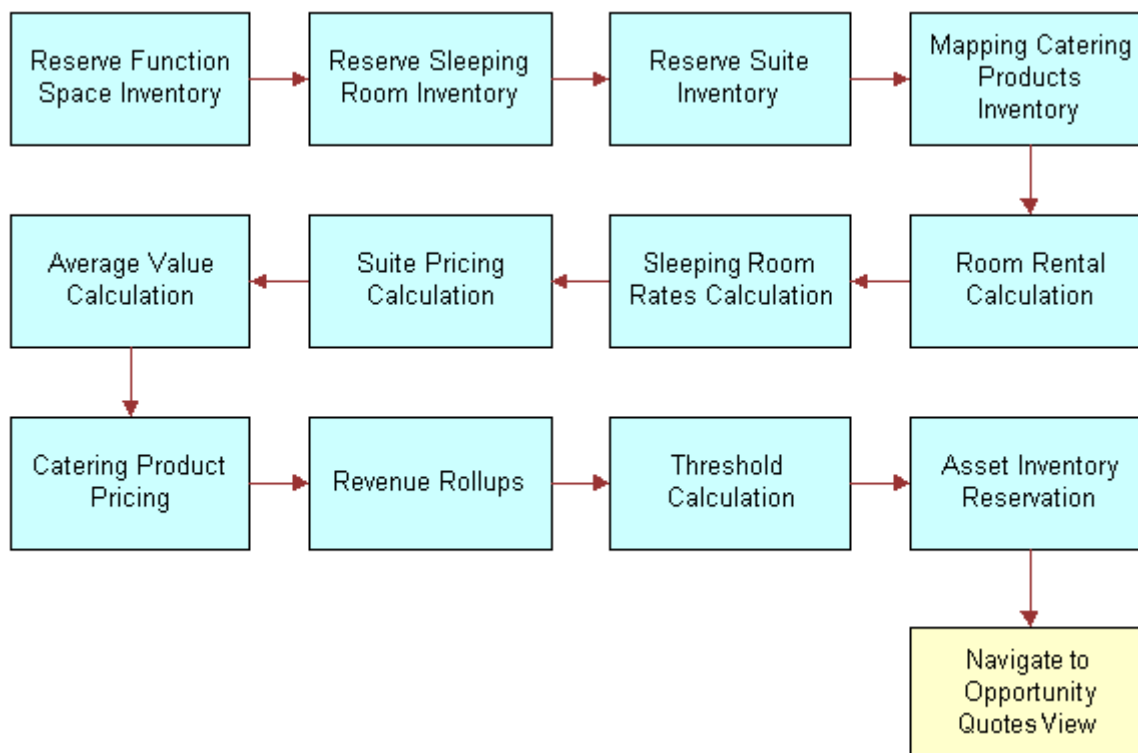
Figure 7. Generate Quote Processes

As shown in Figure 7, when a quote is generated, the following processes occur:

■ Opportunity information is transferred to the quote. This includes notes and billing information.

■ The mapping of generic products detailed in the opportunity are mapped to property-specific products.

■ Room block information 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 which translates the generic requirements for functions and 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 and pricing for catering products occur for products of type Critical.

Quotes and Non-Participating Properties

For nonparticipating properties, generic products (line items and room blocks) are mapped to property-specific products.

However, pricing information is not associated with room blocks, and the availability check for both room blocks and function space is not performed.

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 in 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 checks the summary for each of the properties.

Process of Managing Property-Specific Event Quotes

The following list shows tasks end users typically perform when generating property-specific quotes for an event. Your company may follow a different process according to its business requirements.

End-User Procedures
Perform the tasks in the following procedures to manage quotes:

1 Generating an Event Quote on page 129

2 Modifying an Event Quote on page 129

3 Overriding Multiple Event Quotes on page 130

4 Adding Details to an Event Quote on page 131

5 Modifying the Arrival Date in an Event Quote on page 132

6 Adding Quote Notes on page 133

7 Creating Quote Activities on page 133

8 Creating Attachments for a Quote on page 134

9 Capturing Billing Information for a Quote on page 134

10 Capturing Booking Fee Information on page 134

11 Capturing Credit Requests for an Event Quote on page 135

12 Managing Functions Associated with Quotes on page 136

13 Managing Quote Functions from the Function Screen on page 137

Generating an Event Quote

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 128.

To create a quote for an event property

1 Navigate to the Opportunities screen > Opportunity 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 Properties view tab, and in the Properties list, click New.

5 In the Add Properties dialog box select the property and 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.

Related Topic

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 128.

To modify a quote using the Opportunities Quotes view

1 Navigate to the Opportunities screen > Opportunity 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 Quotes view tab.

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. Automatically populated with the opportunity name. 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 Days	Calculated from values in the Arrival Date and Departure Date fields.
Status As Of Date	Shows the date of the last change in status.
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.
Intermediary Account	This account value is copied from the opportunity, but it can be changed.
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 will be posted.

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 128.

To modify multiple quotes using the Opportunities Quotes view

1 Navigate to the Opportunities screen > Opportunity 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 In the Function Agenda list, select the Function Agenda record, and then scroll down to the Agenda Line Items list.

5 Make any necessary updates to the Line Item records.

6 Click the Room Blocks view tab, scroll down to the Room Blocks list, and update the records as needed.

7 Click the Quotes view tab.

8 In the Quotes list, select the quote records that should be overridden and click to deselect the Do Not Override check box for each record.

9 Click the Properties view tab and in the Properties list, select the property record, and then click Create Quote.

Adding Details to an Event Quote

During the quoting stage of event management, the sales user can support standard business operations and perform the following tasks using Quote screen views:

■ Modifying the Arrival Date in an Event Quote on page 132

■ Adding Quote Notes on page 133

■ Creating Quote Activities on page 133

■ Creating Attachments for a Quote on page 134

■ Capturing Billing Information for a Quote on page 134

■ Capturing Booking Fee Information on page 134

■ Capturing Credit Requests for an Event Quote on page 135

You can also add details from other screens and views:

■ Managing Functions Associated with Quotes on page 136

■ Managing Quote Functions from the Function Screen on page 137

■ Managing Event Room Block Information in Quotes on page 137

■ Time Shifts for Function Spaces and Sleeping Room Blocks on page 139

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.

To modify the arrival date in a quote

1   Navigate to the Quotes screen > List view.

2   In the Quotes list, query for the quote.

3   In the Quote form, click Modify Arrival Date.

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.

  ■   **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.

2   In the Quotes list, query for the quote.

3   In the Quote form, click Modify Arrival Date.

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.

  ■   **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 131 and Process of Managing Property-Specific Event Quotes on page 128.

To add notes to a quote

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 Notes view tab, and choose Public Notes or Private Notes from the visibility filter.

5 In the Notes list, add a record and add the note text in the Description field.

6 Save the record.

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 131 and Process of Managing Property-Specific Event Quotes on page 128.

To add activities to a quote

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 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 record.

Creating Attachments for a Quote

The sales user uses the Quote Attachments view to create attachments during the quoting phase.

This task is a step in Adding Details to an Event Quote on page 131 and Process of Managing Property-Specific Event Quotes on page 128.

To add attachments to a quote

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 Attachments view tab.

5   In the Attachments list, click either New File or New URL.

6   Associate the file and save the record.

Capturing Billing Information for a Quote

The billing information captured on the opportunity is automatically transferred to the quote record. Sales users can verify and update the billing information using the Billing view.

This task is a step in Adding Details to an Event Quote on page 131 and Process of Managing Property-Specific Event Quotes on page 128.

To update and verify billing information

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 Billing view tab.

The Billing form shows the opportunity billing information.

5   Make necessary changes to the billing information, and then save the record.

Capturing Booking Fee Information

Each sales representative in the hospitality industry is 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 events 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 and .

To enter and track booking fee information

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, and then click the Fees view tab.

4 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 and .

To enter credit check information for an event 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 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.

Managing Functions Associated with Quotes

When the sales user clicks Generate Quote, function records are automatically created with fields populated and hierarchical relationships defined.

This task is a step in Adding Details to an Event Quote on page 131 and Process of Managing Property-Specific Event Quotes on page 128.

To validate functions and function line items associated with a quote

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 Quotes Functions list, select the function and verify function information.

5 In the Function Line Items list, verify line item information.

To add functions and line items to a quote

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, add a record, complete the fields, and save the record.

5 Scroll down to Line Items and add additional line items if necessary.

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 113.

Managing Quote Functions from the Function Screen

After the quotes are created, and the sales user 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.

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.

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 Process of Managing Property-Specific Event Quotes on page 128.

Managing Event Room Block Information in Quotes
Sales representatives and events managers can manage room blocks in the quotes stage of event planning using the Quote views.

The views, accessed from the Quote screen > Room Blocks view are:

■ **Room Block Line Items.** This subview allows the user to enter various room block items by room type, and then launch availability and pricing checks.

■ **Negotiation Rates.** This subview allows the user to see the average rates by weekend, weekday, and so on. The view also allows the sales user to give special discounts for sleeping rooms when the customer is bringing in a great deal of function space revenue. Discount rates, however, cannot be lower than the negotiation floor rate.

This task is a step in Process of Managing Property-Specific Event Quotes on page 128.

To update room block information for a quote

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 In the Room Blocks form, update the fields as necessary.

To add line items for 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 From the Room Blocks form, scroll down to the Room Block Line Items list.

5 In the Room Block Line Items list, add a record.

6 Complete the fields and save the record.

Repeat Step 4 through Step 6 to specify additional room block line items.

To view and update room block negotiation rates

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 view tab.

5 Click Calculate Rates.

6 Update the Negotiation Rate and Weekend Negotiation Rate fields if necessary.

NOTE: 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.

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 167.

This topic is included in Process of Managing Property-Specific Event Quotes on page 128.

Reviewing Quote Details and Revenue Estimates

As part of the quote management process, the user can review quote details and summaries, negotiation rates and revenue estimates using five views. The views are:

- **Quote Summary view**. For more information, see Reviewing Quote Summary Information on page 139.
- **Quote Function Revenue Estimates view**. For more information, see Reviewing Revenue Estimates for Quote Functions on page 143.
- **Quote Room Blocks Negotiation Rates view**. For more information, see Reviewing Average Room Block Rates on page 144.
- **Room Blocks screen's More Info view**. For more information, see Reviewing All Room Block Line Items on page 145.
- **Category Line Items screen's More Info view**. For more information, see Reviewing All Category Line Items on page 145.

This topic is included in Process of Managing Property-Specific Event Quotes on page 128.

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.

This section, which is a task in Process of Managing Property-Specific Event Quotes on page 128, includes the following related topics:

- Quote Summary Revenue Thresholds List on page 141
- Quote Summary Functions List on page 142
- Quote Summary Negotiation Rates List on page 142
- Quote Summary Room Block Line Items List on page 142

To review the quote summary

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 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.

The following table describes some of the fields in the Summary form.

Field	Comments
Total Revenue	Total revenue for the quote, 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 line item or room block, the Refresh flag is checked to indicate to users that the Refresh button should be clicked for revenue recalculation.
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 ■ Not Available ■ Partial
Function Space Room Rental	Sum of function space rentals for the quote.
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.

Field	Comments
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 192.
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.

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.

Table 6 describes some of the fields in the Revenue Threshold form.

Table 6. Revenue Threshold Fields

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 (defined by the administrator using the Property Pricing Admin screen).

Table 6. Revenue Threshold Fields

Field	Comments
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 %.

Quote Summary Functions 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 7 describes the links, and the resulting destination when the links are clicked.

Table 7. Function Record Links and Navigation Destination

Field Link	Navigation Result
Date	Function Space Diary screen > Function Space Diary view
Day #	Property screen > Total Availability view
Function Name	Functions screen > Line Items view > More Info
Function Type	Functions screen > Line Items view > More Info
Order #	Orders screen > Event Order view > Functions
Function Status	Quote > Time Shift > Function Shift view

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 Managing Event Room Block Information in Quotes on page 137.

Quote Summary Room Block Line Items List

The Quote Summary Room Block Line Items list shows the room block line items 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. For more information, see Managing Event Room Block Information in Quotes on page 137.

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 are displayed according to parent category.

This task is a step in Process of Managing Property-Specific Event Quotes on page 128.

To review function revenue estimates

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 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 Category	The parent 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 it 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.
Total Line Item Revenue	Sum of the revenue for the line items.
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.

Reviewing Average Room Block Rates

The Room Blocks Negotiation Rates subview shows the average room block rates by weekend, weekday, and so on, allowing the sales user to give special discounts for sleeping rooms when the customer is a good source of potential function space revenue. Discounts, however, cannot be lower than the negotiation floor rate.

This task is a step in Process of Managing Property-Specific Event Quotes on page 128.

To view average room block rates

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   From the Room Blocks form, scroll down and click the Negotiation Rates view tab.

For more information, see Managing Event Room Block Information in Quotes on page 137.

Reviewing All Room Block Line Items

The Quotes Room Blocks screen shows all room block line item records for the property. Users can search for and view room block line items without first accessing each quote.

This task is a step in Process of Managing Property-Specific Event Quotes on page 128.

To review all room block line items

1   Navigate to the Room Blocks screen > More Info view.

2   In the Room Blocks list, query for the room block.

3   In the More Info form, review the information.

Reviewing All Category Line Items

The Category Line Items screen shows all category line item records for the property. This view allows users to search for and review category line items without first accessing each quote.

This task is a step in Process of Managing Property-Specific Event Quotes on page 128.

To review category line items

1   Navigate to the Category Line Items screen.

2   In the Category Line Items list, query for the category line item.

3   In the More Info form, review the information.

13 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

The following list shows topics and procedures that event managers can use to manage inventory for an event. Your company may follow a different process according to its business requirements.

End-User Topics

The following topics provide background information about functions and processes used when managing inventory for an event.

- Suite Booking for Functions on page 157

- Management of Room Blocks at the Quote Stage on page 158

- Background Processes at the Quote Level on page 163

- Inventory Critical Fields at the Function Level on page 164

- Inventory Critical Fields at the Room Block Level on page 165

- Inventory Critical Fields at the Quote Level on page 165

End-User Procedures

To manage inventory for an event, perform the following procedures:

- Detailing a Function on page 156

- Reserving and Overbooking Room Blocks on page 158

- Canceling Room Blocks on page 160

- Booking Suite Categories on page 160

- Booking Specific Suites on page 161

- Canceling a Suite Category on page 162

- Scheduling a Function in a Specific Suite on page 162

- Changing Attributes Critical to Inventory Reservation on page 163

- Actualizing a Function on page 166

- Time Shifting Event Functions and Room Blocks on page 167

- Event Shifting at the Quote Level on page 168

- Canceling a Function on page 154

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. This process 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

A customer may request a larger space for a function than the expected number of attendees indicates. For example, a customer may wants to hold a function with a dance. The expected number of people suggests a smaller room is appropriate; however, if a dance party is held, more space should be allocated to each attendee.

When the Spacious Set flag is set, the system allocates 1.5 time as much space per person than is normally allocated. The expected number of attendees is multiplied by 1.5, and the resulting number is used in the best fit and next fit algorithm. The spacious fit value can be changed through configuration.

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 into account the Spacious Set flag when reserving function space.

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.

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.

Management of Room Block Characteristics at the Opportunity Stage

During the opportunity capture process, the sales representative can add detailed information to the room block record. One of the attributes which characterizes the room block is the room block type. The user can only select generic room blocks at the opportunity stage. The administrator creates the generic room blocks in 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 to it. For more information about creating generic room block records, see Creating Generic Room Blocks on page 57, Adding Room Block Information to an Event Opportunity on page 118, and Mapping Generic Room Block to Property-Specific Room Types on page 59.

Management of Property Characteristics at the Opportunity Stage

There are several property attributes which affect how the quote records are handled during the generate quote process. Two such attributes include the NPP flag (Non Participating Property flag) and the Bypass flag. When property records have either of the two attributes flags set, 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 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 to an opportunity, see Selecting Properties for the Event Opportunity on page 122.

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 to the opportunity record. Generate quote is an automated process which takes into account many factors to generate quote records that meet all the specified requirements.

The generate quote automated process involves invoking inventory and pricing subprocesses including:

■ Function Space and Suite Best Fit and 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 the attributes such as the Bypass flag and Non Participating Property attribute to determine which subprocesses are launched for the agenda created during the opportunity capture process. 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 attributes 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, 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 check if the function space is available with the changed attributes. For more information, see Inventory Critical Fields at the Function Level on page 164.

Management of Functions at the Quote Stage

The sales user 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 button functionality:

■ **Reserve and Next Fit**. For more information, see Using Reserve and Next Fit to Hold Function Space on page 153.

■ **Option**. For more information, see Optioning Function Space on page 153.

■ **Overbook**. For more information, see Overbooking Function Space on page 154.

■ **Cancel**. For more information, see Canceling a Function on page 154.

■ **Copy**. For more information, see Copying a Function on page 154.

■ **Reprice and Reprice All**. For more information, see Function Line Item and Revenue Data Repricing on page 195.

■ **Refresh**. For more information, see Function Line Item and Revenue Data Repricing on page 195.

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 when he or she wants the system to find available function space that meets the event requirements.

Reserve

The Reserve button is typically used under the following conditions:

■ Availability checks for the function were bypassed at the opportunity stage. The sales user updates information for the function space, setup style, expected number of attendees, function type, date, start time, and duration in the Quote Functions view. The user then clicks Reserve to hold the specific space, if available.

■ 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 click Reserve to launch the availability check for the new function space.

Next Fit

When the Next Fit button is clicked, the best available function space (based on number of attendees, setup style, 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 Function view, Inventory Status field. The function record's inventory status field shows a value of Unreserved if the function space reservation could not be completed. At this point, the user clicks Next Fit to launch the process of finding and reserving the best available function space.

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.

Optioning Function Space

When function space predefined authorization is reached, the user can maintain an option on the function space in case a cancellation occurs. For more information about setting up authorizations, see Chapter 7, "Setting Up Inventory Controls."

The Option button can only be used when the inventory status is unreserved, or 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, and the quote owner with the option must reserve the function space within three hours. (The time stipulation can be configured.)

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.

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.

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 every time the user clicks Overbook.

If the function space becomes available, then the overbooked function automatically becomes reserved.

Canceling a Function

If plans change and an event no longer includes a particular function, an events manager can cancel the function using the Function screen's More Info view.

Canceling the function automatically cancels single asset bookings for the function. 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 cancelled 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.

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.

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 8 describes quote and function status values, and the corresponding Inventory states.

Table 8. 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; however, the salesperson 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
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. Functions that have actually taken place have this status. The booking remains in the system as an *actual* booking.	Holding

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 not known, and the space is blocked with a high-level agenda consisting of large contiguous blocks of time. As the event draws near, sales users or event managers create detailed subagendas in smaller time increments for the breakout sessions, apportioning the larger function space that was already blocked.

The sales user 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. It also loses previously held inventory.

A sales user can create a subfunction for another subfunction. For this secondary subfunction, the user cannot select a function space.

When the detailing is complete, the user selects the parent function and then clicks Detail Out from the menu. All subfunctions become established functions, and child subfunction of subfunctions become established subfunctions. The parent function is deleted.

Users can create a function with the Detail flag checked using the Quote Function view as long as the function is not a subfunction and a specific space is selected as a function space (not a function space category).

The steps below assume that a function with the Detail flag already exists in the Quote Function Line Item view. Although detailing is typically done at the quote level, users can also create a hierarchy of functions within the opportunity.

This task is a step in .

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 a record and complete the fields.

6   Click Move up and Move down to position the record below the detail function.

7   Click Indent to make the new function a subfunction of the parent detail function.

8   Select a function space for the subfunction and click Reserve.

To create a subfunction for another subfunction

1 In the Functions list, add a record and complete the fields.

2 Use Move up and Move down to position the new record below the previously created subfunction.

3 Click Indent twice to make the record a subfunction of the first subfunction record created.

4 Click Reserve.

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.

The user can also select a specific space suite or a suite category by clicking the select button in the 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

While working with quote functions, the user may select an inconsistent setup style and function space combination. This situation 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.

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
- Event stage

At the quote stage and event 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 and Next Fit algorithm. 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 has no effect.

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.

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. The sleeping room total group availability appears as a negative value in the Total Availability view. For more information, see Checking Inventory Availability Using Property Screen Views on page 169.

This topic includes the following related topics:

- Reserving and Overbooking Room Blocks on page 158
- Canceling Room Blocks on page 160
- Booking Suite Categories on page 160
- Booking Specific Suites on page 161
- Canceling a Suite Category on page 162
- Scheduling a Function in a Specific Suite on page 162

Reserving and Overbooking Room Blocks

Perform the steps in the following procedures to reserve and overbook room blocks.

This task is a step in .

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 In the Room Blocks list, select the room block and then scroll down to the Room Block Line Items list.

5 In the Room Block Line Items list, add a record and complete the fields.

6 Click Reserve.

The Inventory Status field is automatically updated to Reserved if the room block is available.

7 In the Room Block Line Item record, click the link in the Date field.

The Total Availability view appears.

8 Navigate back to the Quote Room Blocks list.

9 In the Room Blocks list, select the room block 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 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.

5 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 values come from the Central Reservation System (CRS). Integration with CRS is the responsibility of the system integrators.

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 .

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 In the Room Blocks list, select the room block record and scroll down to the Room Block Line Items list.

5 In the Room Block Line Items list, select one or more room block line items.

6 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 allows users to view the schedule of bookings against a function space category or specific space. In the diary view, the user can specify a start date or time scale to view booking information, as well as drag and drop information.

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 148.

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 In the Room Block Line Items list, create a new record, select a room type of Suite Category, and complete the remaining fields.

5 Click Reserve.

 The Inventory Status field is updated to Reserved if the room block is available.

6 Navigate to the Function Space Diary screen, and query for the property.

7 From the Property form, scroll down to the Function Space Diary Gantt chart.

8 If necessary, update the Start Date and Time Scale fields, and 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 148.

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 In the Room Block Line Items list, add a record.

5 In the record, select Suite Category in the Type field, and then complete the remaining fields.

6   Click Reserve.

The Inventory Status field is updated to Reserved if the room block is available.

7   Scroll down to the Item Attributes list and select Specific Suites from the drop-down menu.

8   In the Specific Suites list, click New and select a room from the Room dialog box.

9   Save the record.

The reservation automatically occurs.

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 148.

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   In the Room Block Line Items list, select a room block line item of room type Suite Category.

5   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. 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. If the Function Scheduling button is clicked, the Quote Functions view appears with a newly created function record, but the function cannot be reserved as the Reserve button is disabled in this view.

This task is a step in Process of Working with Event Inventory on page 148.

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 In the Room Block Line Items list, select a room block line item of room type Suite Category.

5 Scroll down to the Item Attributes list and select Specific Suites from the drop-down list.

6 In the Item Attributes list, select the reserved specific suite record and then click Function Scheduling.

This creates a new function record, and takes the user to the Quote Functions view where the specific suite appears in the read-only Function Space field.

7 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 23.

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. At this point, the Inventory Status field is set to Reserved for both Function and Sleeping Room records associated to 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. When the Decision Date passes, the system automatically releases all inventory, which includes Function Space Inventory and Room Block Inventory.

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 148 and includes the following related topics:

■ Inventory Critical Fields at the Function Level on page 164

■ Inventory Critical Fields at the Room Block Level on page 165

■ Inventory Critical Fields at the Quote Level on page 165

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 appears that details a suggested course of action.

NOTE: You can configure the application to eliminate the reminder dialog box, or you can set up a process that automatically checks availability.

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.

Function Space and Setup Style Combination

The user can see the setup styles associated to the specific space on a particular property by navigating to 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 42.

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 prompts the user to check availability with the new parameters.

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

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 details 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 164.

Room Block Changes and Availability Checks

When the user increases the room block for a reserved room block record, a message appears alerting 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.

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.

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 Actualized.

■   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 148.

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 function record that is completed, 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 associated 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 Defining Out-of-Order and Unavailable Function Space at a Property on page 63.

A space is considered to be out of order when there is a physical issue that prevents the use of that space. For example, a water pipe breaks flooding a function space. This function space is designated as out of order for a span of time, with a specified start date and time, and end date and time.

A space is considered as unavailable when the property determines that a specific space is not available at a specified time, or a range of dates because the specific space is being used for other purposes or operationally does not make sense to have the space available for bookings. For example, a hotel has a restaurant that operates only during dinner hours (5-11 P.M.). During these hours of operation the restaurant is unavailable for bookings. The space is unavailable for a specific period. Each day the space is unavailable at the same time.

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, the Inventory Status is set to Unreserved.

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.

This task is a step in .

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 From the Original Quote Functions list, scroll down to the Revised Quote Functions list, and then click Accept to accept the revised function or Reject to reject the revised 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, 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 room block back, and a positive day value shifts the room block forward.

   ■   Select the Shift by Date check box and choose a date.

9   Click Shift Room Blocks.

10 From the Original Room Blocks list, scroll down to the Revised Room Blocks list.

11 Click Accept to accept the revised room block or Reject to reject the revised room block.

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 inventory.

This task is a step in .

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 169.

■ **SR Type Availability.** For more information, see Reviewing SR Type Availability on page 170.

■ **Total Availability.** For more information, see Reviewing Transient, Group, and Total Availability on page 170.

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 displays 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 a seven-day period. The user can query for a different date range and view the group availability numbers for that period.

The information displayed on the view includes:

■ Authorization and room information

■ Group Blocked and projection information

■ Total Group Availability calculations

A Special Dates button is available for users to obtain information about any special dates or sell notes for a particular property. When the user clicks the Special Dates button, a list of Sell Notes/ Special Dates appears. The list corresponds to the date range that is being displayed for inventory.

This task is a step in Process of Working with Event Inventory on page 148.

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.

Reviewing SR Type Availability

The SR Type Availability view shows the availability information for a given sleeping room type at a particular property. The availability numbers are displayed by room type and date. When the user navigates to this view, the user sees the sleeping room availability for the current date as well as for the next seven days. The user can query for different sleeping room types and date combinations to display different availability numbers.

The user can also 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, the user navigates to the SR Type Availability view and sees availability information beginning with the date assigned to the Room Block Line Item record.

This task is a step in Process of Working with Event Inventory on page 148.

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.

Reviewing Transient, Group, and Total Availability

The sales representative, event execution user, and the revenue manager can use the Property Total Availability view to gain a better understanding of the total sleeping room availability information for a property. The Total Availability view contains four read-only sections.

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.

Under the property form, three lists display availability figures by total group, total transient and total availability. By default, all three lists show availability counts, by type, starting with the current date across a seven-day period. The user can query for a different start date, which is displayed synchronously across the three lists.

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 Available

■ Transient Booked

■ Sell Notes

■ Group Picked Up

■ Transient Optimal

Transient availability information is typically populated by system integrators.

The Property Total Group Availability list is identical to the list that appears in the Property screen's Total Group Availability view.

The Total Availability list shows the sum total of the transient and group information. It provides a snapshot view of the total number of available sleeping rooms.

Table 9 describes the information that appears in the rows in the Total Availability list.

Table 9. Total Availability Row Description

Field	Comments
Date	The date for the total availability information.
Capacity	A calculated field that displays a sum of the all the sleeping rooms for the property.
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.
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.

The Special Dates button allows users to obtain information about any special dates or sell notes for the property that correspond to the date range that is being displayed for inventory.

The user can also navigate to the Property Total Availability view by clicking the link in the Date field of any Room Block Line Item record. The Total Availability view appears showing a start date that corresponds to the date assigned to the Room Block Line item record.

This task is a step in Process of Working with Event Inventory on page 148.

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.

14 **Booking Hospitality Assets**

This chapter describes the process of booking Hospitality assets. It includes the following topics:

Process of Booking Hospitality Assets

The following lists show the procedures that event managers and operations managers typically perform to book assets for an event. Your company may follow a different process according to its business requirements.

End-User Procedures

To book assets for an event, perform the following procedures:

1   Defining the Asset Inventory Status Display Color Scheme on page 177

2   Booking Critical and Non-Critical Assets on page 177

3   Viewing Assets Associated with a Product on page 178

4   Viewing Asset Availability and Booking Information on page 179

5   Locating the Owner of the Booked Asset on page 179

6   Locating a Comparable Substitute for a Booked Asset on page 180

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. Required items for an event are reserved 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 San Mateo property, Serial # 7896-0987

■ Wurlitzer Piano at San Jose 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.

■ **Non-Critical.** A non-critical 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 Non-Critical Assets

Non-Critical 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 non-critical 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, only line item changes are processed for that 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 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.

When the Double Book button is clicked, a time-specific request is created for the asset. A double-book request does not, however, automatically result in an asset reservation for the second requestor if the first request is cancelled. 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 non-critical products may be double-booked.

When an asset is double-booked, the Inventory Status for the line item changes to Double Booked. In the Function Line Item Availability view, the Gantt chart shows two bars that represents the bookings, with the double-booked asset displayed in a different color. The Gantt chart shows the times for which individual assets are reserved or double-booked and the identities of the users who have booked or double-booked 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 10 describes the status values that occur when booking assets.

Table 10. 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.

Table 10. Booking Statuses

Status	Description
Not Enough Assets	There are either no assets or less than the quantity of assets required. For example, if there are four assets associated with a particular product at the property and the user is trying to reserve five assets, then the system would show a status of Not Enough Assets.
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.

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 .

To assign status colors to assets

1 From the application-level menu, choose Navigate > Site Map > Function Space Administration > Function Space Diary Administration.

2 In the Inventory Color Schema list, click New.

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 Non-Critical Assets

Use the following procedures to reserve critical and non-critical assets for Function Line Items.

NOTE: This procedure should only be performed after function line items are defined.

This task is a step in .

To reserve assets for function line items

1 Navigate to the Functions screen and query for the function.

2 In the Functions list, select the function and click the link in the Function Name field.

3 In the Line Items list, click Auto Book to automatically assign available assets to the line items of the function.

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.

   If the booking is successful, the field shows a Status of Booked.

To double-book assets for a function line item

1 Navigate to the Functions screen > Functions List view.

2 In the Functions list, query for the function record.

3 In the Function record, click the link in the Function Name field.

4 In the Line Items list, select the line item, and then click Double Book.

Viewing Assets Associated with a Product

You can view the assets associated with a specific hospitality product using the Function Line Items Assets view.

This task is a step in .

To view assets associated with a product

1 Navigate to the Functions screen and query for the function.

2 In the Functions list, select the function and click the link in the Function Name field.

3 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

You 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. The Gantt charts in these views are read-only but you can change the time axis by selecting a different time scale and start date and then clicking Go.

In Figure 8, 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.
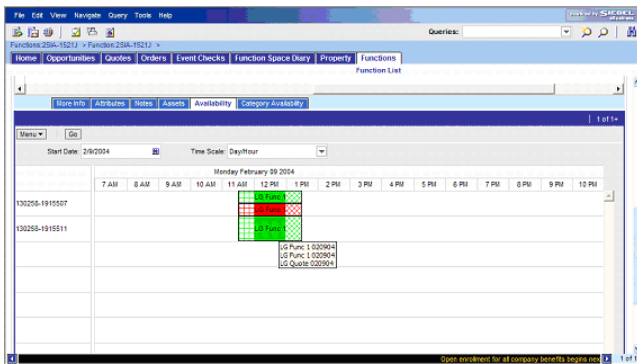
Figure 8. Asset Availability Gantt Chart

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 174.

To determine who has reserved an asset

1 Navigate to the Functions screen > Functions List.

2 In the Functions list, query for the 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 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 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 .

To locate a substitute asset

1 Navigate to the Functions screen > Functions List.

2 In the Functions list, query for the 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 to view details.

15 **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 FSI Diary

The following list shows tasks that administrators typically perform to set up the Function Space Diary. Your company may follow a different process according to its business requirements.

Administrator Procedures

Before the Function Space Diary can be used, an administrator must perform the following tasks:

1 Defining Property Day Parts on page 31

2 Defining Function Space and Asset Inventory Status Indicators on page 67

End-User Procedures

Perform the steps in the following procedure to navigate to the Function Space Diary.

■ Navigating to the Function Space Diary on page 188

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 broad 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 the user to change the time scale. The user, for example, can filter the data shown by Start Date, Time Scale, and Display.

This topic includes the following related topics:

Function Space Diary Screen Elements

Figure 9 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 and Revenue Management view tabs. The Property form shows the name and type, the number of function rooms, and number of sleeping rooms for the default property. From the form, the user can query for a different property.
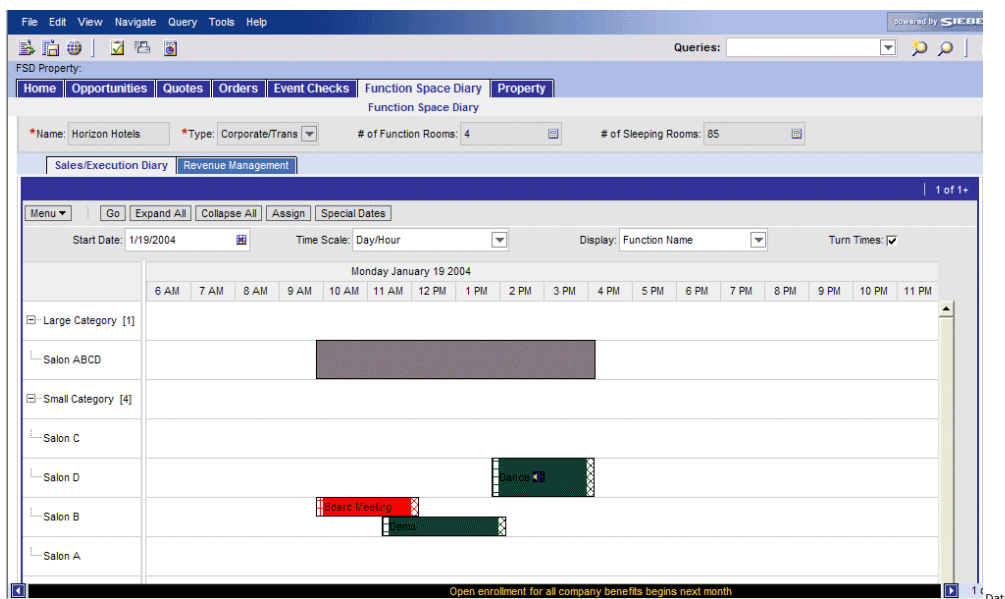
Figure 9. Function Space Diary Day View

In Figure 9, the Function Space Diary shows current bookings and overbookings 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 bar contains the function name.

To see more details for function and function line items, the user can click the Function Name link on the booking to automatically navigate to Quotes > Functions. After reviewing function details, the user can click Back to return to the Function Space Diary view.

Each category and its component specific space is shown on the y-axis. The user can expand or collapse individual categories by clicking + or -. The categories and specific spaces are displayed according to the Display Sequence specified within the Property Administration screen's Category view and Property Administration screen's Specific Space view, respectively. In addition, each category shows the default capacity of the category next to its name.

When the mouse pointer is positioned on the category or specific space name, the name is highlighted and underlined in a different color. The user can click the category name link and navigate to the Property Administration screen's Category view. If the user clicks the specific space name link, the Property Administration screen's Specific Space view appears.

Specific space that is not assigned to a category appears as an individual item. To see the list of available function space, the user scrolls vertically.

By scrolling horizontally, the user can see the bookings for the same function space across time. This capability is useful if the user wants to review past dates with actualized bookings to compare availability at a similar season in the past. Users can view holidays, sell notes, and need dates by clicking the Special Dates button. This information helps the user understand availability in the context of any special comments or special dates.

Function Details in the Function Space Diary

The user may only be interested in a summary of function details. One option is to 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, and expected number of attendees. In addition, when the mouse pointer is positioned over the setup or tear-down time, the start and end date and time periods are displayed in the ToolTip.

If the Turn Times check box is selected, the time periods for each booking's setup and tear down are displayed using the pattern predefined by the administrator.

If a particular function is expected to be noisy, and the noise factor is indicated in the function's line item view, a noise icon appears next to the function name in the Function Space Diary view.

When an overbooking or optioned booking occurs, the indicator bar is split vertically. Each booking is displayed with a separate color as defined by an administrator. The predefined colors and patterns assigned to each bar represent the function's inventory status and setup and tear-down information.

Temporarily assigned category spaces are shown against specific spaces in a color predefined by the administrator. Dependency bookings appear in grey. 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 user 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.

When a function space is set to Out of Order or Unavailable, the user can view this information in the Function Space Diary. The color for an Out of Order and Unavailable Function Space is the same as that of a reserved booking. The label shows the booking type (Unavailable or Out of Order) with no setup and tear-down time.

Information Display Options in the Function Space Diary

The user can configure the information that appears in the Function Space Diary display using various controls.

Start Date

Click the calendar select button to choose the start day for the diary.

Time Scale

The Time Scale list of values includes:

- Day/Day Part
- Day/Hour
- Day/Half-Hour
- Day/Quarter-Hour
- Month/Day-of-Week
- Week/Day

Display

This control allows the user to select different options for viewing booking information. For example, an event operations associate might only be interested in the setup styles, while a chef might only be interested in the meal periods. A revenue manager might only want to view the function types. Display options include:

- Functions Name
- Function Type
- Business Type
- Meal Period
- Quote Name

■   Setup Style

When the user changes the display option, all of the bookings show the label selected by the user. For example, if the user selects setup style, then all the bookings appear with the setup style information. The previous display label becomes the ToolTip.

Turntimes Flag

Select this check box to display setup and tear down times using the pattern set up by the administrator. If this flag is deselected, then all bookings are shown without turntime indicators in the diary.

Drag-and-Drop Operations in the Function Space Diary

The user can perform the drag-and-drop operations in both the Sales/Execution view and the Revenue Management view of the diary. The following examples illustrate typical drag-and-drop operations.

Dragging a Booking to a Different Time, Different Function Space

The user 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, the user can drag and scroll at the same time.

Specific Space Booking Conversion to Category Booking

If the user wants to convert a specific space booking into a category booking, the user 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 same spot or by selecting the booking and right-clicking the mouse. Category Overflow bookings dragged to a specific space are automatically converted to a specific space.

Option 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 the user that the selected function space time conflicts with an existing booking. 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.

Optioning and Overbooking on a Category

The user can pick up a booking and place it on the category bar. If possible, the booking is automatically reserved and assigned. If the booking cannot be reserved, a dialog box appears providing the user with the option of Overbooking, Optioning, or Canceling the booking.

Swapping Specific Spaces

If the user wants to swap specific spaces, for example swapping spaces A and B, the user drags space A onto space B. Space B becomes either optioned or overbooked. The user then drags space B to the place on the Gantt chart previously occupied by space A.

Setup Style Conflict

If the user drags 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.
```

Turntime Conflict

If a user drags a booking with a turntime that overlaps with the turntime of another booking, the following message appears:

```
This booking has created a turntime conflict.
```

User Cannot Drag a Booking to a Bar with No Function Space

The user cannot drag a booking to a position that has no y-axis bar.

Expand All and Collapse All Methods in the Function Space Diary

The user can employ the Expand All and Collapse All buttons to show and hide data in the Function Space Diary.

■ **Expand All.** The user can view the entire hierarchy of categories and each category's specific space.

■ **Collapse All.** The user can view overflow bookings such as category bookings that could not be temporarily assigned, such as 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.

Booking Conversion and the Function Space Diary

If the Revenue Manager likes the specific space assignments that are currently 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.

Function Space Diary Revenue Management View

The Function Space Diary's Revenue Management view is similar to the Sales/Execution diary view with one exception. The Revenue Management view shows all of the functions that are associated with the selected property.

Function Space Diary and Total Sleeping Room Availability

The user can use the Function Space Diary to review sleeping room availability by clicking the major time axis (Date field). This action takes the user to the Property Total Availability view, which shows property availability data starting from the selected date. After reviewing the information, the user can return to the diary view by clicking Back.

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 Pricing Admin > Out of Order view

■ Property Pricing Admin > Unavailable view

■ Function Space Diary screen

This task is a step in .

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 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

1 From the application-level menu, choose Navigate > Site Map > Property.

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 In the Total Availability view, click Go to Diary. The following options appear:

■ Total Availability

■ SR (Sleeping Room) Type Availability

■ Total Group Availability

To navigate to the diary using the Property Pricing Admin screen Out of Order view

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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 click the link in the Start Date Time field.

The property record appears, and the diary shows the selected date.

To navigate to the diary using the Property Pricing Admin screen Unavailable view

1 From the application-level menu, choose Navigate > Site Map > Property Pricing Admin.

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 click the link in the Recurr Start Date field.

The property record appears, and the diary shows the selected date.

To navigate to the diary using the Function Space Diary screen

1 From the application-level menu, choose Navigate > Site Map > Function Space Diary.

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

3 Click the appropriate view tab (Sales/Execution or Revenue Management).

16 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

Revenue managers and 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. The sales user applies these prices to sleeping rooms, function space, and other ancillary products (for example food, beverages, and audio-visual) 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) that is converted into an order.

Pricing management involves three primary pricing processes:

1 Pricing data management and pricing administration. For more information, see Chapter 10, "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 17, "Revenue Management."

Function Space Pricing

Function space pricing takes into consideration various pricing elements. The following topics discuss these elements:

■ 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, default rentals for each day of the week are established as well as the exceptions for different seasons. For more information, see Defining Function Space Pricing Types and Rental Fees on page 95.

Function space room rentals are used 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, approving 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 Defining Function Space Threshold Pricing on page 97.

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 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 11 shows the functions and time intervals.

Table 11. 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 touches. The day part is included even if the function only touches the day part for a few minutes.

The system then determines the threshold associated with each of the day parts listed for the function. Table 12 shows how day parts are set up for the property.

Table 12. Example Setup of Day Parts for a Property

Day Part Name	Start Time of Day Part	End Time of Day Part
Overnight	12:01 A.M.	6:00 A.M.
Morning	6:00 A.M.	8:59 A.M.
Afternoon	8:59 A.M.	12:01 P.M.
Lunch	12:02 P.M.	2:00 P.M.
Evening	2:01 P.M.	6:00 P.M.
Night	6:01 P.M.	11:59 P.M.

Table 13 shows the thresholds that are in effect. The assumption is that function space category (FSC) 1 and 2 have the same threshold amount.

Table 13. 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

As Table 14 shows, the required threshold calculation occurs using the following method, assuming the turntimes are zero.

Table 14. 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

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, and both functions share 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 when new functions are added or function space is changed. Multiple functions can be selected and repriced at the same time. If Reprice is launched from the Orders Functions view or Quotes Functions view, the selected line items are repriced.

When the user clicks Reprice, new catering products are priced, and existing catering products are repriced for the selected functions.

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 desired for items previously flagged for pricing bypasses or if a new pricing scenario is being explored at the sales prospect stage. If Reprice All is launched from the Orders Functions view or the Quotes Functions view, all of the line items are repriced at the same time.

When Reprice All is clicked, the following actions occur:

■ The room rental amounts are aggregated for all functions since 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.

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 Refresh is clicked, 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.

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 Defining a Profit Series and Percentages on page 96 and Sleeping Room Pricing Administration on page 88.

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 15 shows the contracted value and price for a standard room on three different dates.

Table 15. 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*100+100*110+150*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 users 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 16 shows, on July 5 there are 100 contracted rooms that include 10 complimentary rooms and 90 rooms that are not complimentary.

Table 16. Contracted Rooms Including Complimentary and Noncomplimentary 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 17 shows.

Table 17. Calculated Revenue for Contracted and Complimentary Rooms

Date	Contracted	Complimentary	Revenue Calculation #	Single Price	Revenue
July 5	100	10	90	150	150*90=13500
July 6	130	20	110	120	110*120=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 18 shows the Average Rate calculation, including Complimentary rooms.

Table 18. 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 19 shows the Average Rate calculation, excluding Complimentary rooms.

Table 19. 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 examples 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.

Case 1

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 20 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 20. 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

Case 2

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 21 shows Property 1 with the following rates:

■ Average Weekday Rate = $2000/10 = $200

■ Average Weekend Rate = $3000/10 = $300

Table 21. 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 user 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 user wants to discount below the negotiation floor, then the user can submit a request to the revenue manager to approve the discount. For more information, see Chapter 17, "Revenue Management."

Table 22 shows an example of pricing for a property that does not have different rates for weekends and weekdays.

Table 22. 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 23 shows the values that appear in the Quote Room Blocks Negotiation Rates view.

Table 23. 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:

$(100*200+150*30)/130 = \$188.46$

The Average Floor is calculated as:

$(100*180+30*135)/130 = \$169.62$

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 dip below or rise 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 scenario. In this cases, 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 - 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.

17 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 204
- Scenario for Revenue Management on page 204
- Process of Revenue Management on page 205
- Completing the Revenue Evaluation Form on page 205
- Submitting a Quote for Revenue Evaluation on page 206
- Evaluating the Event Quote on page 207
- Responding to a Quote Evaluation on page 208
- Updating and Reducing the Negotiation Floor Rate on page 210

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, quote summary and the comments, and approves the quote with some conditions.

Process of Revenue Management

The following lists show the procedures that the sales representative and the revenue manager typically perform to manage a revenue evaluation for a quote. Your company may follow a different process according to its business requirements.

Sales Representative Procedures

The sales representative typically performs the following tasks during a revenue management evaluation:

1 Completing the Revenue Evaluation Form on page 205

2 Submitting a Quote for Revenue Evaluation on page 206

Revenue Manager Procedures

The revenue manager typically performs the following tasks when evaluating a quote for revenue purposes:

1 Evaluating the Event Quote on page 207

2 Responding to a Quote Evaluation on page 208

3 Updating and Reducing the Negotiation Floor Rate on page 210

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 205.

To complete the revenue evaluation form

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, select the 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.

■ (Optional) Click the select button in the Historical Quote Name field, and associate other historical quotes to the evaluation.

Historical quotes allow the revenue manager to reference the revenue brought in by a customer at other properties.

■ (Optional) Click the select button in the Increment Revenue Source field and associate new or existing revenue source records with the evaluation.

■ (Optional) Click the select button in the Commission records and associate new and existing commission records with the evaluation.

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 24 describes the status conditions during the revenue evaluation process.

Table 24. Revenue Evaluation Statuses

Status	Description	Next State
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.	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 .

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 Evaluation 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.

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 25.

Table 25. 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 .

To review a submitted quote evaluation

1 Navigate to the Evaluations screen.

2 In the Evaluations 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.

Responding to a Quote Evaluation

As part of the quote evaluation process, the revenue manager can create and assign quote evaluation activities to other individuals. 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.

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 205.

To assign evaluation activities

1 Navigate to the Evaluations screen.

2 In the Evaluations 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.

To create an evaluation response

1 Navigate to the Evaluation screen.

2 In the Evaluations 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	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.

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 205.

To update the negotiation 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 view tab.

    The Negotiation Rates list is empty until the user clicks Calculate Rates.

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.

18 Finalizing a Quote, Turnover, and Confirming Event Details

This chapter describes the procedures that event managers 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

This scenario provides an example of a process performed by hospitality sales representatives and event managers. Your 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 deal 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 in the director's home page.

The events director accepts the turnover and then chooses the events team, designating one team member as the events manager. The events 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

The following list shows tasks typically performed by the sales representative and event director when finalizing the quote and managing turnover tasks for a hospitality event. These tasks are performed after a final quote is selected.

End-User Procedures

To finalize a quote and complete turnover tasks, perform the following procedures:

1   Generating an Agreement for the Quote on page 215

2   Setting an Event Quote Status to Definite on page 216

3   Completing and Submitting the Event Turnover Checklist on page 216

4   Reviewing and Accepting or Rejecting the Turnover (Event Manager) on page 218

5   Gathering and Confirming Event Details on page 218

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 .

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 From the Quote Functions list, click the Agreements view tab.

5 In the Agreements list, click AutoContract.

The following table describes the fields in the record.

Field	Comments
Agreement #	Automatically generated by the system.
Name	Automatically populated with a system-generated value; can be changed.
Type	Automatically set to Contract.
Status	Automatically set to In Progress as a default.
Account	The account associated with the opportunity and quote.
Last Name	The last name of the primary contact.
First Name	Automatically populated, based on the last name.
Valid	Automatically populated. Indicates the agreement is valid.

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.

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. 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: Before setting the quote status to Definite, the user should verify that the quote does not have unreserved function spaces or room blocks. If the quote's Status is not Cancel or Lost/Turndown, then the inventory status should be Reserved, Optioned or Overbook.

This task is a step in .

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.

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*. After the sales representative completes the Turnover Checklist, it is submitted 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 .

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	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	Predefined turnover assessment template.
Iteration Name	Automatically populated with a unique identifier.
Description	Automatically populated based on the description of the selected assessment template.
Status	The turnover status. For example, submitted, accepted, and rejected.
Turnover Date	Read-only system-generated date and time. The date the quote is turned over to event management.
Turnover To	Employee at the property. The selected employee is automatically added to the team.
Assessment Score	Calculated based on the values specified in the turnover questions.
Assessment %	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 (Event Manager)

When the Turnover Checklist is submitted to Events Management, 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 events manager or team member, and it appears in the Turnover Evaluations screen list.

After reviewing the turnover, the events manager can either reassign the Turnover Checklist or accept or reject it. The events manager reassigns the Turnover Checklist by updating the Turnover To field.

This task is a step in Process of Finalizing a Quote and Managing Turnover on page 214.

To review the Turnover Checklist

1   Navigate to the Turnover Evaluations screen.

2   In the Turnover Evaluations 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.

   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.

Gathering and Confirming Event Details

After the turnover checklist 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 214 and includes the following related topics:

■   Confirming Sleeping Room Details on page 219

■   Confirming Function Space Details on page 219

■   Gathering and Confirming Function Details on page 219

■   Gathering and Confirming Additional Requirements for the Event on page 220

■   Event Change Management on page 220

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 12, "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

■ The event manager can shift the times of the functions, using the Timeshift button.

For more information, see Chapter 12, "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 configurator 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, and the configurator launched to design a complex product.

■ **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 pianos and projectors, 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.

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 manager compares Bill To Account, and Bill to Contact information, verifies that Group master or House accounts are set up, and that the credit approval process is completed.

■ **Parking and Transportation.** In the Quote screen's Notes view, the manager adds any special requests for parking and transportation and notes any obvious patterns in arrival and departure times. This information helps with front desk staffing and 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 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, such as date changes and cancellations, to the quoted event. 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 17, "Revenue Management."

■   Creating a quote activity for the sales representative to determine if the event can be rebooked.

19 Generating and Managing Event Orders

This chapter describes generating an order for an event, a key process in event finalization activities. It includes the following topics:

About Event Order Generation

After an event manager gathers the significant details of a function, the manager creates an order. When an order is generated from a quote, the following processes occur:

- The order is associated with each function in the quote.

- Line items associated with the function are copied to the order line items, including pricing information.

After the primary order has been generated, the events manager can add different orders to the quote and associate these orders to the functions, creating a network of orders. Each function can be associated with one or more orders that specify goods and services to be provided for the event. Multiple functions that occur on the same date, as well as functions that occur on different dates, can be associated with an 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).** May span several days.

- **BEO (Banquet Event Order).** Used to generate BEO reports, which may, in turn, be used as guides to event setup. Intended for covering one day of an event only.

- **No BEO.** 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, which 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 events manager generates a primary order for the quote and then continues to generate a network of orders associated with the quote. These orders can be generated at any point in time.

After the orders are generated, the event manager continues to modify order line items as needed to meet billing requirements and other conditions. In addition, other order-related activities are performed that include 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

The following list shows tasks event managers typically perform when generating orders and managing order detail for a pending event. Your company may follow a different process according to its business requirements.

End-User Procedures

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 BEO type. When the order is generated, the following quote information is copied to the primary order:

■ Account

■ Contact

■ Sales Representative

■ Property

■ Price List

■ Billing Account

■ Billing Contact

■ Quote #

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 225.

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.

The primary order record is created and the Order Function Line Items view appears.

Creating and Managing Event Orders Associated with a Function

After the events manager creates a primary order for an event, the manager can add details to the order, and create a network of related orders. To manage the event order, the manager may perform the following tasks:

■ Creating Event Orders Associated with a Function on page 227

■ Changing the Primary Event Order Associated with a Function on page 227

■ Associating Event Orders to a Function Line Item on page 228

■ Creating Functions from the Orders Screen on page 228

■ Synchronization of Functions and Function Line Items on page 229

■ Adding Notes to an Event Order on page 229

■ Adding Attachments to an Event Order on page 229

■ Viewing Event Orders and Visibility on page 230

Creating Event Orders Associated with a Function

Perform the following steps to create an order and associate it with a quote function that already has a primary order associated with it.

After the primary order is created, other orders can be added to the quote and associated with the function record. These orders are created and associated under the Quote screen > Functions Line Item View.

This task is a step in Process of Generating and Managing Event Orders on page 225.

To create an order and associate it with a function

1   Navigate to the Order screen > Event Order List view.

2   In the 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   In the function record, click the select button in the Order # field, and in the Order dialog box, click New.

6   In the new record, complete the Type field, and then click Save.

7   Click OK to associate the new order with the function record.

Changing the Primary Event Order Associated with a Function

Many orders may be associated with a function record, but there can be only one primary order. When the event manager changes the primary order for the function, a system prompt asks whether or not to change all the line items. If the user clicks OK, all the line items are moved to the new primary order. If the user clicks Cancel, line items in the new primary order are not updated.

This task is a step in Process of Generating and Managing Event Orders on page 225.

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 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.

5 In the Function record, click the link in the Order # field, and in the Orders list select another order record.

   A dialog box appears and asks if the user wants to change all associated line items to the new order.

6 Click OK to accept all changes.

Associating Event Orders to a Function Line Item

Function Line items can be associated with different orders. When the event manager associates another order to 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 225.

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 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 link 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 of Functions and Function Line Items on page 229.

This task is a step in Process of Generating and Managing Event Orders on page 225.

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 the 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 records.

Synchronization of Functions and Function Line Items

When the event manager creates a function or function line item record using the Order Functions view, a synchronization process is triggered to create the same function and function line item records in the Quote Functions view. Synchronization also occurs with the Order Functions and line items when function records are created using the Quote Functions and function Line Items views. The synchronization process occurs only when a primary order is created.

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 21, "Creating Hospitality Reports."

This task is a step in Process of Generating and Managing Event Orders on page 225.

To create notes for an order

1 Navigate to the Order screen > Event Order view.

2 In the Orders list, query for the 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 completed.

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 225.

To create attachments for an order

1 Navigate to the Order screen > Event Order view.

2 In the Orders list, query for the 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 Event Orders and Visibility

As with quotes, order records have visibility requirements that determine which orders the event user can view. Table 26 lists the types of users and the type of order records they are able to access.

This task is a step in .

Table 26. Event Users and Order Record Visibility

User	Visibility Rule
The Director of Events at a property would need to see all orders associated with a property.	The Director of Event Management would be able to see all the orders for his or her property in the All Event Orders for My Property visibility list.
The Corporate Event Execution Vice President may need to query for orders across the system.	The Corporate Vice President for Event Execution can see all orders for the entire system in the All Event Orders Across Organization visibility list.
The Event Manager associated with the order can review the order on the manager's own home page.	The Event Manager who creates the orders can see the order on his or her home page, in the Orders screen's My Event Orders visibility list.

To view all orders associated with a quote

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, query for the 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.

20 Generating Event Checks

This chapter describes the event checks processes and Banquet Event Order (BEO) report creation before an event. It includes the following topics:

About Event Checks

The Event Check (invoice) process is made up of several subprocesses which take place before and after the event.

Users can either open an Event Check before or after an event; however, the Event Check must be opened before a Trial Check is generated and an Event Check is posted. When the Event Check is opened, the Event Check header is created, and a unique number is assigned.

A Trial Check is generated to calculate the total price, including taxes and service charges, that is quoted to the customer. The Trial Check can be generated many times before the actual event occurs.

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's orders are frozen and a BEO report is printed and distributed 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 uses the Revise functionality to modify the order function line items to reflect changes to the original order. This process helps event management make sure that the Event Check represents the actual quantities and items used for the event.

When the updating process is complete, the event manager posts the Event Check. In cases where changes need to be made after the Event Check has been posted, the posted Event Check is voided and the user updates a copy of the voided Event Check and posts the new version of the check.

Process of Generating Event Checks

This section 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. These nonsequential procedures can be performed as many times as needed before and after the event occurs.

End-User Procedures

To create and generate Event Checks, perform the following tasks.

1 Updating Event Orders on page 233

2 Freezing Orders Before Event Checks on page 234

3 Revising the Order After the Event on page 235

4 Generating an Event Check on page 236

5 Generating a Trial Check for an Event on page 236

6 Posting Event Checks on page 237

7 Posting Event Checks on page 237

8 Reviewing Event Checks on page 242

9 Voiding an Event Check on page 243

Related Topic

Generating and Printing a BEO Report on page 248

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. The product type (simple or complex) determines how the product is displayed on the Event Check.

When associating products to 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 27 lists the flags and describes how Event Checks are calculated when the flags are set.

Table 27. 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.
Complimentary	When selected, prevents any charge for the selected line item by setting the item's price to zero, and automatically selects the Waived check box. Typically used for an item that is always provided at no charge. When selected for a line item that is a complex product, automatically sets the price to zero for each subsidiary line item.
Waived	Prevents any charge for the selected line item by setting the item's price to zero. When selected for a line item that is a complex product, also automatically sets the price to zero for each subsidiary line item. Automatically selected when the Complimentary check box is selected. 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 232.

To add products to the Order Functions view

1 Navigate to the Orders screen > Event Order 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 click New.

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.

Freezing Orders Before Event Checks

Before a Banquet Event Order (BEO) report is generated, the event manager must freeze the event orders so that changes that affect event execution cannot occur after the BEO reports are generated. The event manager can freeze individual event orders or the manager can freeze all orders that have functions on a specified date. After Freeze or Freeze Day is clicked, no changes can be made to orders until Revise or Revise Day is clicked.

This task is a step in .

To freeze an order for an event

1 Navigate to the Orders screen > Event Order view.

2 In the Event Orders list, query for the order.

3 In the Order record, click the link in the Order # field.

4 In the Order Functions list, select the function record.

5 From the Orders form, click Freeze.

To freeze all orders for a day

1 Navigate to the Orders screen > Event Orders view.

2 In the Event Orders list, query for orders that occur on a specific date.

3 Click Freeze Day.

A dialog box appears with the current date shown.

4 Change the date to the freeze date, and then click Freeze Day.

All orders with functions on that date become read-only.

5 In the Event Orders list, select each order to make sure the record cannot be edited.

NOTE: If no orders with functions exist for the specified date, a no matching records message appears.

Revising the Order After the Event

After the event has concluded, the operations manager must update the event order with changes that occurred during the function. For example, the event order might be revised if products different than those specified in the order were used. Product quantities would be updated to reflect actual consumption.

Event managers make changes to the Event Order using the Orders screen's Functions view. The read-only records can only be edited after the event manager clicks Revise. The changes should reflect what actually occurred at the event so that an accurate invoice can be generated during the Post Event Check process.

The user can create and sequence internal and external notes associated to an order using the Event Order Notes view. Event Managers can update these note records to detail changes that occurred at the actual event.

Changes made after the event order is frozen are tracked on the Order Line Item record. The Modified field on the Order Line Item record tracks each change that is made subsequent to the Revise process.

This task is a step in .

To update individual orders

1 Navigate to the Orders screen > Event Order view.

2 In the Event Orders list, query for the order record.

3 In the Order record, click the link in the Order #.

4 In the Order form, click Revise.

5 Click the appropriate view tabs, and scroll within each view to update order details, functions, line items, and notes.

To update all orders in a day

1 Navigate to the Orders screen > Event Order view.

2 In the Event Orders list, query for all the order records that occur on a specific date.

3 In the Event Orders list, select all the order records and click Revise Day.

4 In the dialog box, change the current date to the desired date, and then click Revise Day.

5 Click the appropriate view tabs and scroll within the view to update order details, functions, line items, and notes.

If there are no orders associated with the specified date, the following message appears:

```
No matching records exist
```

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 status of the event order is set to Event Check, an event check header is created, and the Event Check # field is populated with a unique identifier.

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 .

To generate an event check for an individual order

1   Navigate to the Orders screen > Event Order view.

2   In the Event Orders list, query for the order.

3   Select the order and click Open Check.

The Event Check# field is populated and the Status field is updated to Event Check.

To generate an event check for all orders in a day

1   Navigate to the Orders screen > Event Order view.

2   In the Event Orders list, query for all order records that occur on a specific date.

3   Click Open Day.

A dialog box appears that shows the current date.

4   Change the date to the desired date, and then click Open Checks.

An Event Check is opened for each order record in the list.

5   In the Event Orders list, select each order record for that specified date, and make sure each order has an event check associated with it.

If there are no orders on the specified date, the following message appears:

`No matching records exist`

Generating a Trial Check for an Event

A Trial Check can be generated only after an Event Check is opened. 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 process can occur only after an event check is opened and before the event check is posted. Generating a Trial Check allows the operations manager to review and update order details before the final Event Check is posted.

This task is a step in Process of Generating Event Checks on page 232.

To generate a trial event check

1 Navigate to the Orders screen > Event Order view.

2 In the Event Orders list, query for the event order.

3 In the Event form, click Trial Check.

The Event Checks screen's Line Items (Guest) view appears.

Posting Event Checks

After event order updates are completed, the events 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 set to Closed and the Status field in the Event Check record is 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 232.

To post an individual event check

1 Navigate to the Orders screen > Event Order view.

2 In the Event Orders list, query for the event order.

3 In the Event Orders list, click Post Check.

To post all event checks for a day

1 Navigate to the Orders screen > Event Order view.

2 In the Event Orders list, query for the event orders that occur on a specified date.

3 In the Event Orders list, 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.

If there are no orders associated with the specified date, the following message appears:

`No matching records exist`

Related Topic

■

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.

The Hospitality application follows 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 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 split packages and menus. For more information on simple and complex products, see Chapter 6, "Setting Up Products and Assets."

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.

However, the Accounting Event Check shows the post 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

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 28 on page 239.

■ Rules for Parent Products with Child Records. See Table 29 on page 239.

■ Rules for Mid-Tier Products with Parent and Child Records. See Table 30 on page 240.

■ Rules for Child Products Without Associated Parent or Child Products. See Table 31 on page 242.

Table 28. 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
			
			Account:
			
			    Item A = $80
			
			    Item A Tax = $20
			
			    Item A Total = $100

Table 29. 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.	Original Total Price	$0	Guest:
			
			    Item A = $100
			
			Account:
			
			    Item A = $0

The function line item is a Split Package.	$0	$0	Guest:
			
			    Item A = $0
			
			Account:
			
			    Item A = $0

Table 29. 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.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Account: Item A = $80 Item A Tax = $20 Item A Total = $100
The function line item is a Setup Style.	Not displayed	Not displayed	n/a

Table 30. 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, and the parent function line item is a Package.	Not displayed	Adjusted Total Price	Account: Item A = $80 Item A Tax = $20 Item A Total = $100
The function line item is a Menu, and the parent function line item is a Split Package.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Account: Item A = $80 Item A Tax = $20 Item A Total = $100
The function line item is a Menu, and the parent function line item is a Setup Style.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Account: Item A = $80 Item A Tax = $20 Item A Total = $100

Table 30. 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, and the parent function line item is a Setup Style.	Original Total Price	$0	Guest: Item A = $100 Account: Item A = $0
The function line item is a Package, and the parent function line item is either a Package, Menu, or Split Package.	Not displayed	$0	Account: Item A = $0
The function line item is a Split Package, and the parent function line item is a Setup Style.	$0	$0	Guest: Item A = $0 Account: Item A = $0
The function line item is a Split Package, and the parent function is either a Package, Menu, or Setup Style.	Not displayed	Not displayed	n/a

Table 31. Rules for Child Products Without Parent or Other Child Records

Criteria	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The parent function line item (either the parent products or mid-tier products) is a Setup Style.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Account: Item A = $80 Item A Tax = $20 Item A Total = $100
The parent function line item (either the parent products or mid-tier products) is a Split Package.	Original Total Price	Adjusted Total Price	Guest: Item A = $100 Account: Item A = $80 Item A Tax = $20 Item A Total = $100
The parent function line item (either the parent products or mid-tier products) is not a Menu, Setup Style, or Split Package.	Not displayed	Adjusted Total Price	Account: Item A = $80 Item A Tax = $20 Item A Total = $100
The parent function line item (either the parent products or mid-tier products) is a Menu.	Not displayed	The function line item is not displayed	n/a

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 .

To review event checks

1   Navigate to the Event Checks screen > Event Check List.

2   In the Event Check list, query for the 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

Since posted event checks can no longer be updated, if, during a review, the manager finds a problem with an event check, 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 .

To void a posted event check

1   Navigate to the Event Checks screen > Event Checks List.

2   In the Event Checks list, query for the Event check record.

3   In the Event Check record, change the value in the Status field to Voided, and then save the record.

   The Event Checks screen > Line Items (Guest) view appears.

4   Update the new event check record.

5   Post the event check.

6   For more information on posting an event check, see .

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 21, "Creating Hospitality Reports."

21 Creating Hospitality Reports

This chapter describes five preconfigured reports in the Hospitality application. It includes the following topics:

Process of Generating Hospitality Reports

The following lists show the procedures that event managers and operations managers typically perform to create hospitality reports for an event. Your company may follow a different process according to its business requirements.

End-User Procedures

To create hospitality reports for an event, perform the following procedures:

1 Generating and Printing a BEO Report on page 248

2 Validating the Print Line in SOE Flag on page 251

3 Generating and Printing the SOE Report on page 252

4 Generating and Printing the Quote Summary Report on page 254

5 Generating and Printing the Guest Event Check Report on page 257

6 Generating and Printing an Accounting Event Check Report on page 260

About Banquet Event Order (BEO) Reports

Events 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.

Figure 10 shows a sample BEO report. 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.

Figure 10. Sample BEO Report

As shown in Figure 10, 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.

Optionally, another set of notes associated to the category appears beneath the category header. These notes, created during the category setup, provide details about the category. The category notes are typically referenced by property personnel only.

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.

■ Cancelled functions are not displayed on the report.

■ Function Line Items associated with a particular Function are listed by Type, then Service Start Time, and then are grouped by Category.

■ Function Line Items that are type Menu appear as the first group under a Function.

■ Function Line Items that are not type Menu, Package, or Split Package are included in the second group to appear under a Function.

■ Function Line Items that are type Package or Split Package do not appear in the report.

Related Topics

Generating and Printing a BEO Report

Complete the steps in the following procedure to generate and print a BEO Report for a Hospitality event.

This task is a step in .

To generate and print a BEO report

1 Navigate to the Order screen > Event Order List view.

2 In the Orders list, query for the order.

3 Select the order, and from the toolbar, click the Reports button.

4 In the Select a Report menu, click Banquet Event Order.

The BEO report is generated in a Siebel Report Viewer window.

5 Click the Print Setup button to display a standard Windows print dialog.

6 Choose appropriate printer settings, and then click OK.

Related Topic
About Banquet Event Order (BEO) Reports on page 246

About Schedule of Events (SOE) Reports

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, but does not contain information for food, beverage, and setup requirements. 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.

Figure 11 shows a sample SOE report. 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.

Figure 11. 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.

■   Sub Functions appear in italics.

■   Cancelled functions do not appear in the report.

■ Functions Line Items that are of type Package, Split Package, and Menu 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, and then are grouped by Category.

Related Topics

Validating the Print Line in SOE Flag

Perform the steps in the following procedure to verify that the Function Line Item is flagged, allowing the Line Item to appear in the SOE report.

This task is a step in .

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 In the Function record, click the link in the Function Name field.

4 From the function 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.

You may need to click the show more button to expose this check box on the form.

Generating and Printing the SOE Report

Perform the steps in the following procedure to generate and print an SOE report.

This task is a step in Process of Generating Hospitality Reports on page 246.

To generate and print the SOE report

1 Navigate to the Quotes screen > List view.

2 In the Quotes list, select the quote.

3 From the toolbar, click the Reports button.

4 In the Select a Report menu, click Schedule Of Events.

The SOE report is generated in a Siebel Report Viewer window.

5 Click the Print Setup button to display a standard Windows print dialog.

6 Choose appropriate printer settings, and then click OK.

Related Topic
About Schedule of Events (SOE) Reports on page 249

About the Quote Summary Report

The Quote Summary Report is generated and printed by the event manager to display aggregated totals for sleeping rooms and functions associated to 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 17, "Revenue Management."

Figure 12 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.

Figure 12. 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 is the sum of the contracted sleeping rooms.

■ The Total Sleeping Room Revenue 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 is the sum of the function space area designated for the function.

■ The Total Quote Revenue is the sum of the Total Sleeping Room Revenue and FS Revenue.

Related Topics

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 .

To generate and print a Quote Summary report

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 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.

8 Choose appropriate printer settings, and then click OK.

Related Topic

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 20, "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.

Figure 13 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. External notes that are created and associated with the event checks appear beneath the administrative section. Only external notes are allowed in the guest version of the Event Checks Report. If notes are not associated with the event check, the section does not appear in the report.

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.

Figure 13. 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 to 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 257

Generating and Printing an Accounting Event Check Report on page 260

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 Generating Hospitality Reports on page 246.

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 Check # field.

The Event Check Line Items (Guest) view appears.

4 From the toolbar, click the Reports button.

5 In the Select a Report menu, click Invoice - Guest.

The Guest Event Checks report is generated in a Siebel Report Viewer window.

6 Click the Print Setup button to display a standard Windows print dialog.

7 In the print dialog, choose appropriate printer settings, and then click OK.

Related Topic
About the Guest Event Check Report on page 254

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.

The report consists of sections that provide information about the account, a summary of the event check, and the event check's invoiced line items. Figure 14 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. Unlike the Guest Event Checks report, both external notes and internal notes that are created and associated to the event checks appear beneath the administrative section. If there are no associated notes, the section does not appear in the report.

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.

Figure 14. 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 an Accounting Event Check Report on page 260

About the Guest Event Check Report on page 254

Generating and Printing the Guest Event Check Report on page 257

Generating and Printing an 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 Generating Hospitality Reports on page 246.

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.

The Event Check Line Items (Guest) view appears.

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.

The Accounting Event Checks report is generated in a Siebel Report Viewer window.

7 Click the Print Setup button to display a standard Windows print dialog.

8 Choose appropriate printer settings, and then click OK.

Related Topic

About the Accounting Event Check Report on page 258

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