SIEBEL *e*HOSPITALITY GUIDE

VERSION 7.0 REV. H

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Contents

Introduction

Chapter 1. Product Overview

Chapter 2. Getting Started

Chapter 3. Setting Up Siebel eHospitality

Chapter 4. Using Siebel eHospitality Before Events

Introduction

This guide describes the features and procedures that are specific to the Siebel eHospitality application. It should be used in combination with the other guides available on the *Siebel eHospitality Bookshelf* CD-ROM. However, the information in this book supersedes information about standard Siebel products provided in other documentation. In addition, some setup information that is specific for Siebel eHospitality is included in this guide.

This book will be useful primarily to people whose titles or job descriptions match one of the following:

Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Events Directors	Persons responsible for overseeing events planning and execution, including allocating specific events to individual Events Managers.
Events Managers	Persons responsible for detailed planning and execution of specific events.
Operations Staff	Persons responsible for carrying out the many activities involved in preparing for and carrying out events.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.

Persons responsible for installing and configuring Siebel eHospitality need a thorough knowledge of the architecture of Siebel eBusiness Applications and standard Siebel installation and configuration procedures.

Persons responsible for entering administrative information need a thorough knowledge of the goods and services they plan to offer, as well as any applicable taxes on those goods and services. A working understanding of the Siebel Sales application is also strongly recommended.

Persons responsible for entering information about specific events need basic knowledge of how to use a Siebel application.

How This Guide Is Organized

This guide is organized into three main sections:

- Introductory material, including a high-level overview of the functionality available in Siebel eHospitality. This information is contained in this Introduction and in Chapter 1, “Product Overview.”
- Administrative material, describing how to set up Siebel eHospitality and what kind of data to provide before using the application to plan and carry out events. This information is contained in Chapter 2, “Getting Started” and Chapter 3, “Setting Up Siebel eHospitality.” This chapter should be read by anyone involved in preparing Siebel eHospitality for production use.
- End-user material, describing how to use eHospitality to plan, carry out, and follow up after events. This information is contained in Chapter 4, “Using Siebel eHospitality Before Events” and Chapter 5, “Using Siebel eHospitality After Events.” Depending on the amount of customization your organization requires, you may or may not wish to use these chapters to instruct actual end users of Siebel eHospitality. If your organization requires substantial customization, you can use these chapters to educate application developers regarding the standard functionality that is available before customization.

Using the Siebel Product

It is strongly recommended that you read *Fundamentals* so that you can make optimal use of your Siebel application, especially if you are new to Siebel software. *Fundamentals* provides detailed coverage of the Siebel user interface and how to use it; working with data; locating information with the query and find features; sharing information with other users; and so on. The features presented in *Fundamentals* appear throughout the Siebel application suite; they are introduced through procedures you can learn and use in your own Siebel application.

Revision History

Siebel eHospitality Guide, Version 7.0 Rev. H

Product Overview 1

This chapter provides an overview of Siebel eHospitality.

About Siebel eHospitality

The hospitality industry provides venues for many kinds of events, including conferences, meetings, celebrations, seminars, and so on. Siebel eHospitality is designed to help event planners and event operations personnel within hospitality firms to 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 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 eHospitality 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 eHospitality.

Business Purposes of Screens in Siebel eHospitality

The screens available within Siebel eHospitality serve a variety of business needs. This section includes information on screens that have been created or modified specifically for use in Siebel eHospitality. For information about other screens, see the *Siebel eHospitality Bookshelf* CD-ROM.

Purposes of Siebel eHospitality Administration Screens

Table 1 describes the business purposes served by administration screens that have been created or modified specifically for use in Siebel eHospitality.

Table 1. Purposes of Siebel eHospitality Administration Screens

Screen	Purpose
Assets	Used to store information about individual assets that your organization has available, including where each asset is located.
Catalog Administration	Used to assign products to catalogs.
Category Administration	Used to organize products (goods and services) into categories such as food and beverages, audio/visual 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 eHospitality.
Pricing Administration	Used to specify price for each product or service you offer. In eHospitality, each price list can be designated for use at specific geographical locations or for use with particular orders.
Product Administration	Used to define goods and services for events. Also used to define combinations of goods and services as product packages. The More Info form has elements specific to Siebel eHospitality.
Property Administration	Used to specify the rooms and the event team members available at each property, along with applicable taxes for the location. All the views for this screen are specific to Siebel eHospitality.
Tax Administration	Used to specify charge codes, taxes, and service charges. All the views for this screen are specific to Siebel eHospitality.

Purposes of Siebel eHospitality End User Screens

Table 2 describes the business purposes served by end-user screens that have been created or modified specifically for use in Siebel eHospitality.

Table 2. Purposes of Siebel eHospitality End User Screens

Screen	Purpose
Events	Used to review, add, and modify information about proposed and accepted events. The Functions, More Info, and Orders views for the Events screen contain elements specific to Siebel eHospitality.
Functions	Used to review, add, and modify information about functions within proposed and accepted events, including line items for needed goods and services. Also lets you reserve assets such as audio/visual equipment for specific functions. All views for the Functions screen are specific to Siebel eHospitality.
Home	Provides quick links to proposed and accepted event listings, quotes, orders, invoices, and activities.
Invoices [Event Invoices]	Primarily a read-only screen from which invoices can be generated as reports, but can also be used to void an invoice.
Order	Used to specify actual goods and services supplied during an event. Also used to generate trial checks and to finalize the charges that will appear in event invoices.

Business Scenario

The following scenario describes how eHospitality would typically be used to plan and manage an event. A diagram follows the scenario, (see Figure 1), illustrating the basic sequence of tasks.

Overview

A software development company has contacted a resort chain regarding the possibility of holding a one-day new-hire training session in San Francisco. S. Ross is an Events Manager at the San Francisco location for the resort chain. She will manage the event using Siebel eHospitality.

Specifying Information About a Pending Event

Bill Smith, of the event sales team for the resort, discusses the event requirements with the software development company. He creates an event record in Siebel eHospitality and enters the basic event requirements, including the dates of the event, the functions to be included in the event, and the location of the event. Bill knows that the Events Manager at the San Francisco location is S. Ross, so he enters her name as a member of the team who will be managing the event.

When Bill finishes entering the event requirements, he sets the event status to Pending. For any specified member of the event team, including S. Ross, this adds the event to a list of pending events that appears on the eHospitality home page.

Reviewing Pending Events

S. Ross comes to work and logs in to eHospitality. On the home page, she sees that a new event, Siebel Systems Training, is listed in the My Pending Events list. To find out about the event requirements, she clicks the event name. This displays some general information about the event, and lists the individual functions that will be included in the event.

To verify that the event does not conflict with anything else on her schedule, she chooses Event Calendar from the Show drop-down list.

Everything appears to be in order, so she clicks on the event name to return to the previous view, and changes the Transfer Status to Accepted. From this point on, she is responsible for planning and managing the event.

Specifying Event Details

S. Ross begins specifying more detailed information about the event, including assigning additional personnel to the event team. She also begins listing activities that she must complete as part of preparing for the event. She clicks the Activities view tab and adds two new activities. The first is to call the software development company and ask for additional details about event requirements. The second is to contact the restaurant manager to ensure that the broken patio will be repaired by the event date.

Creating Functions and Specifying Function Details

S. Ross reviews the list of functions provided by Bill Smith of event sales. He has listed breakfast from 8am to 9am, a meeting from 9am to noon, a coffee break from 10:30am to 10:45am, a meeting from 1pm to 5pm, and a coffee break from 3pm to 3:15pm. All these functions will be held in the same room.

From past experience, S. Ross knows that the software development company always registers people for training, so she clicks New and creates a registration function to be held from 8am to 9am, along with breakfast. Since registration will use the same room and time period as breakfast, she clicks the move up button to position the registration record under the breakfast record, and then clicks the promote one level button to make registration a subfunction of breakfast. She also sees that the salesperson has labeled the coffee breaks as functions, but since they occupy the same space as the meeting, she reclassifies them as subfunctions.

Creating Orders

Next, S. Ross clicks the Orders view tab and creates a new order record for the event. This allows her to begin specifying line items to be provided during the individual functions.

Specifying Order Details

S. Ross clicks the Order # to display the Orders screen, where she specifies additional details about the order. She then navigates to the Function screen, selects a function for the training event, and begins entering line items for the function She specifies the foods and beverages required for breakfast and coffee breaks, the audio/visual equipment required for morning and afternoon meetings, and the room setup required for the event as a whole, which includes tables, chairs, pencils, and pads.

Reserving Assets

The audio/visual requirements for the meeting include a special projector that connects to a computer and displays the contents of the computer screen. The San Francisco location of the resort chain possesses only one such projector, so S. Ross must make sure that the projector will be available on the day of the event. She would like to reserve this projector from 7:30am to 5:30pm, so it can be set up and ready as soon as her event begins. As a start, she specifies it as a line item for the breakfast function, although the projector will not actually be needed until the meeting function begins.

S. Ross knows that the computer projector is classified as a Critical Resource in the product listings in eHospitality. Because it is a Critical Resource, if the projector is available on the day of the event, it should automatically receive a status of Booked when it is specified as a line item for a function. However, S. Ross notices that the status is Not Available. This is because the projector is booked for another event during the requested time period. S. Ross clicks the Assets subview tab, selects the projector in the assets list, and clicks Double Book to register her request for the projector.

Next, S. Ross clicks the Availability subview tab, to discover who has reserved the computer projector for the day she needs it. She discovers that the projector is reserved only from 7:30am to 8:30am, for a breakfast meeting by a community organization. The reservation was made by her immediate supervisor, Herman Wilson, who is a member of the organization. S. Ross discusses the situation with her supervisor. They decide that the projector can be moved into the room where the Siebel training is held between 8:30am and 9am, after the community breakfast has finished with it.

S. Ross moves the projector line item from the breakfast function to the morning meeting function, and notices that the status is set to Booked. She copies the line item and modifies it to specify that the projector will also be needed for the afternoon meeting function. The status is again set to Booked, so the projector is successfully reserved for the training event.

Opening the Event Check

Evie Owens of event operations is a member of the event team for the training event. On the day of the event, she is in charge of setting up for the event and making sure it goes smoothly. As one of her standard procedures, she opens the event check to allow changes to be made to the event order. When the trainer for the software development company arrives, he notices that there are no herbal teas on the breakfast table. Evie tells him that a selection of herbal teas is available, and adds a line item to the breakfast function specifying that a basket of herbal teas will be provided for breakfast.

Processing the Event Check

After the event is complete, Evie Owens confers with the other operations personnel who helped to set up and carry out the event. She makes a few additional adjustments to line items, to reflect on-the-spot changes to goods and services actually provided.

When she is satisfied that all line items reflect the actual goods and services provided, she clicks Trial Check to create a trial invoice that shows the charges for all goods and services provided. She finds one error in a line item discount, corrects it in the line item, and clicks Trial Check again. This time, everything is correct.

Generating the Invoice

Evie Owens is now ready to generate the final invoice to send to the event customer, the software development company. She displays the order associated with the event, and clicks Post Check to indicate that all order items have been finalized. She then clicks the Line Items (Guest) view tab, to indicate that she is generating a customer invoice, and selects Reports from the application-level View Menu. She selects Invoice - Guest as the type of report to generate, and the invoice appears in a separate window. She prints the report and is ready to mail it to the customer.

To generate a more detailed invoice for internal accounting purposes, Evie also clicks the Line Items (Accounting) view tab, again selects Reports from the View Menu, and now selects Invoice - Accounting as the type of report to generate.

With the generation of both Guest and Accounting invoices, event operations completes its responsibilities for the event.

Workflow Diagram: Sequence of Tasks

The following diagram, Figure 1, shows a typical sequence of eHospitality tasks.

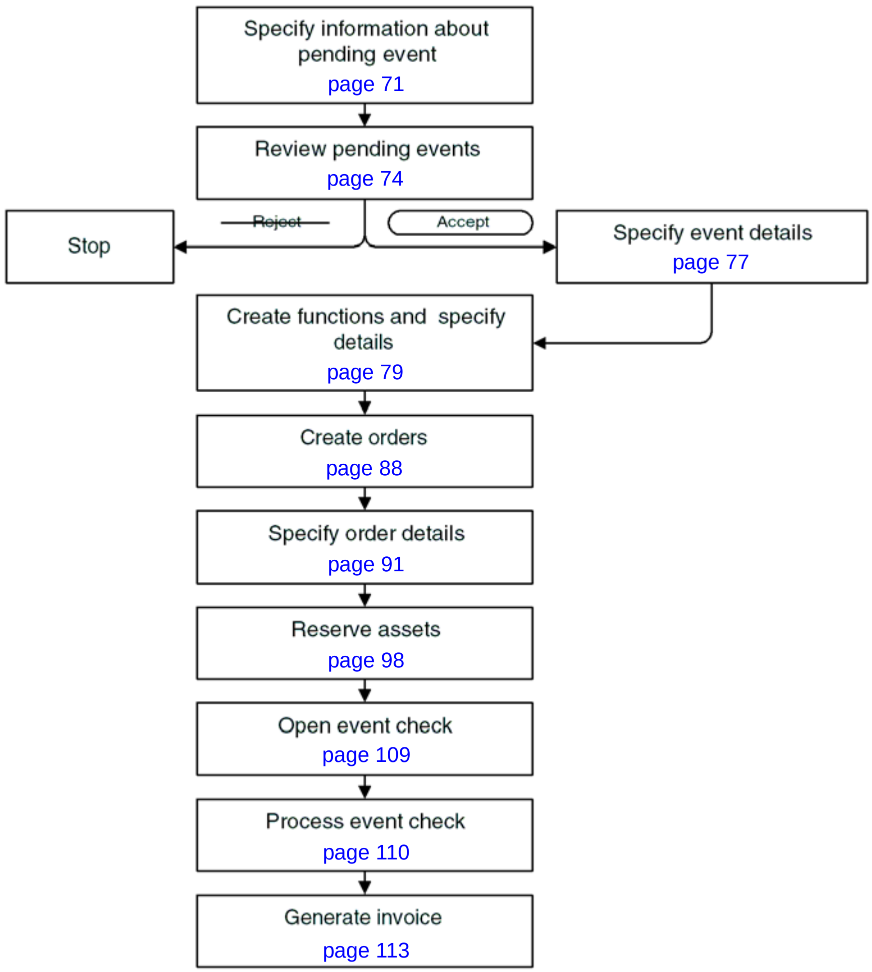

Figure 1. Typical Sequence of Tasks for Planning and Carrying Out an Event

Getting Started 2

This chapter provides a high-level overview of the administrative tasks you must perform before you begin using Siebel eHospitality to plan and carry out events.

Before Getting Started with Siebel eHospitality

Before setting up Siebel eHospitality, 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*.

In addition, if you are upgrading from version 6.X, see *Upgrade Guide for Microsoft Windows* or *Upgrade Guide for UNIX*.

Getting Started with Siebel eHospitality

To set up Siebel eHospitality, you must perform the following tasks:

- Activate workflow processes

  Workflow processes must be activated for invoice creation.

- Set up catalogs

  A catalog is a collection of products arranged in a logical hierarchy of categories.

- Create product categories and subcategories

  Categories and subcategories allow you to group similar products together and assign them appropriate service charges and taxes.

- Create simple and complex products

  Complex products are made up of simple products. For example, a complex product might be an A/V Projector that includes simple products such as an extension cord, a lens cap, and so on.

- Set up properties (locations for events)

  Each event can be associated with one property, but multiple rooms, teams, and taxes can be associated with a property.

- Create assets for each product

  An asset represents a specific instance of a product. For example, a user can create a product such as a piano. This product can have multiple assets such as a Yamaha piano at one property and a Baldwin piano at another property.

- Create price lists

  Each price list can specify more than one kind of pricing, for example, list price, promotional pricing, and so on. Price lists are associated with both the property and specific orders.

- Define and associate charge codes, taxes, and service charges

  Charge codes link taxes, properties, and service charges to products.

Figure 2 shows the recommended workflow for setting up Siebel eHospitality.

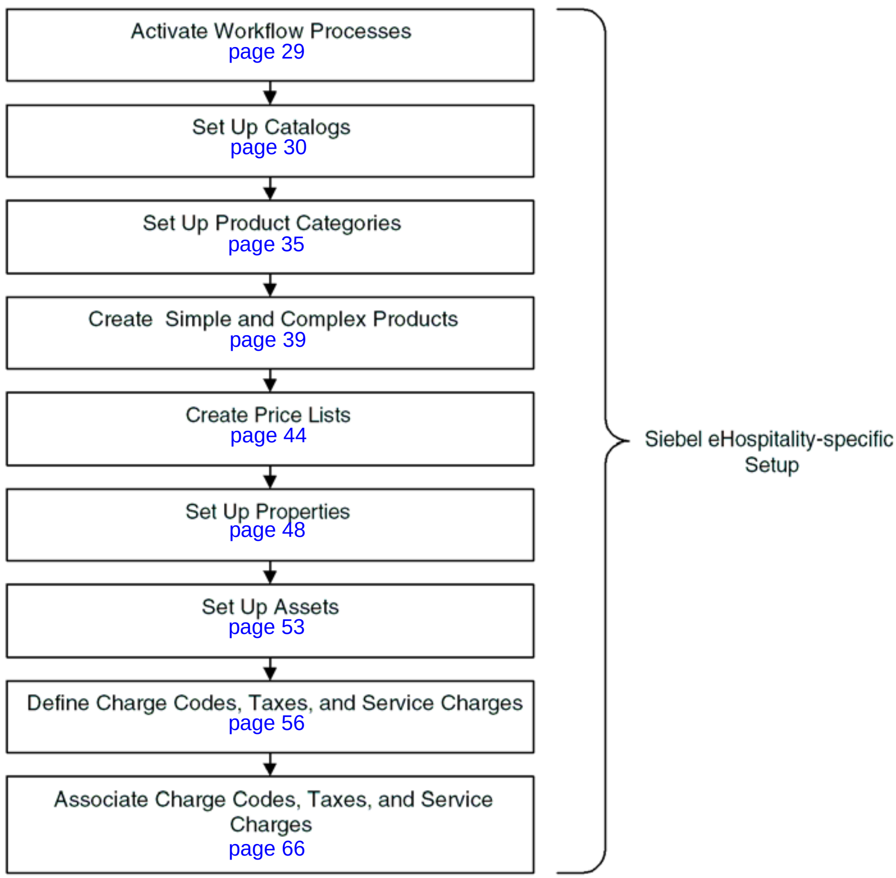

Figure 2. The eHospitality Setup Workflow

Setting Up Siebel eHospitality 3

This chapter covers only the features of Siebel eHospitality that are different than the features of standard Siebel 7.0 eBusiness Applications. It is meant to be used as a supplement to the documentation for Siebel 7.0.

This chapter is intended for Siebel system administrators who are responsible for installing, maintaining, and upgrading Siebel applications. Using Siebel eHospitality as an end user is described in the chapters that follow.

To benefit from the instructions in this chapter, you should have an understanding of the Siebel environment and Siebel applications.

Use the procedures in this chapter after you have completed the standard installation and setup procedures discussed in *Siebel Server Installation Guide for Microsoft Windows* or *Siebel Server Installation Guide for UNIX*. If you are upgrading from version 6.X, also see *Upgrade Guide for Microsoft Windows* or *Upgrade Guide for UNIX*.

This chapter provides a high-level overview of the administrative tasks you must perform before you begin using Siebel eHospitality to plan and carry out events. First, you activate the workflow processes, then you set up the Siebel eHospitality-specific features, and finally you set up the optional features. For a diagram of the recommended workflow, see Figure 2 on page 26.

Understanding Products in Siebel eHospitality

Figure 3 shows how products are associated with catalogs and product categories, as well as with charge codes, taxes, service charges, and properties.

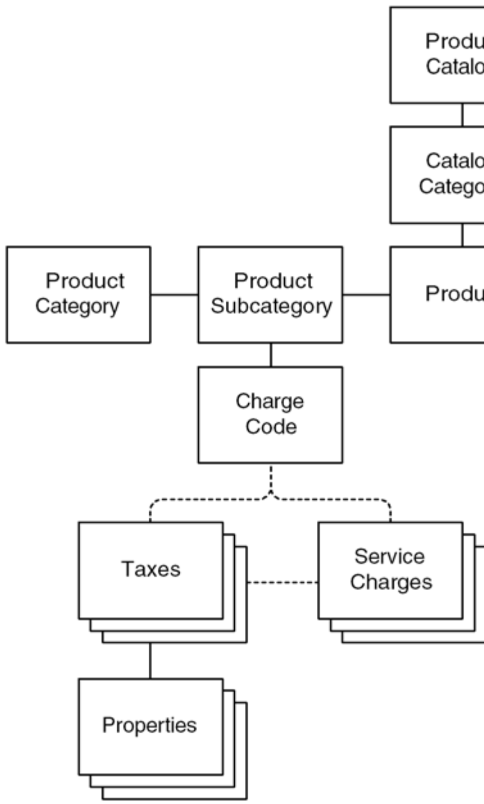

Figure 3. eHospitality Product Structure

Activating Workflow Processes

As part of the setup process, you must activate workflow processes. If you do not activate the Siebel eHospitality (SHM) workflow processes, invoice creation fails because buttons in the Order Function view depend on these workflow processes. For more information about invoice creation, see Chapter 5, "Using Siebel eHospitality After Events."

NOTE: Workflow processes must be activated before using the Siebel eHospitality application. However, activating workflow processes is not part of the Siebel eHospitality-specific tasks, so this procedure can be implemented either before or after setting up Siebel eHospitality.

To activate workflow processes

1. From the application-level menu, choose View > Site Map > Siebel Workflow Administration > Workflow Processes.
2. In the Workflow Processes list, query for SHM*.

   This query returns the following seven records: SHM Go to View, SHM Open Check, SHM Open Checks, SHM Post Check, SHM Post Checks, SHM Trial Check, and SHM Voiding Process.
3. Select the first workflow process in the list and click Revise.

   A copy of the process is created with a status of In Progress.
4. Click Activate.

   The workflow process is activated with a status of Active and version of 1.
5. Repeat these steps for each SHM workflow process in the list.

The SHM workflow processes are now ready for use.

Setting Up Catalogs

In Siebel eHospitality, a catalog is a collection of products arranged in a logical hierarchy of categories. Users other than the administrator cannot view products unless the products are assigned to a catalog (for example, San Francisco Property Catalog) and to a category within that catalog (for example, Food, Beverages, Setup Styles, and so on).

After you create a catalog, you associate products with that catalog. The same product can be associated with many catalogs.

The following subsections describe how to create catalogs, add categories to catalogs, and associate products with categories within a catalog.

- "Creating Catalogs" on page 31
- "Adding Categories to a Catalog" on page 32
- "Associating Products with Catalog Categories" on page 33

For more information about catalogs, see *Siebel eSales Administration Guide*.

Creating Catalogs

Use the Catalogs view in the Catalog Administration screen to create catalogs.

To create a catalog

1. From the application-level menu, choose View > Site Map > Catalog Administration > Catalogs.
2. In the More Info form, click New to create a new catalog, and provide information in the fields.

   The following table describes some of the fields.

Field	Comments
Effective End Date	Date the catalog stops being available for use.
Effective Start Date	Date the catalog becomes available for use.
Name	The name of the catalog.

Adding Categories to a Catalog

Category management is specific to Siebel eHospitality. Use the Catalog Administration screen to add categories to a catalog. For example, you may want to add the category Food to the San Francisco Property Catalog.

To add a category to a catalog

1. From the application-level menu, choose View > Site Map > Catalog Administration > Catalogs.
2. In the Name field in the Catalogs list, click the name of the catalog with which you want to add a category.
3. In the Category Details form, click New to create a new category, and then provide information for the fields.

   The following table describes some of the fields.

Field	Comments
Effective End Date	Date the category stops being available.
Effective Start Date	Date the category becomes available for use.
Name	The name of the category.

Associating Products with Catalog Categories

You add products to catalogs by associating them with categories that belong to those catalogs. For example, you may want to add a 7 oz. Filet Mignon product to the catalog category Food in the San Francisco Property Catalog. This is done using the Products view tab in the Catalog Administration screen.

To associate a product with a catalog category

NOTE: This procedure assumes the products (both simple and complex) that you want to associate with the catalog category are already defined. For information about creating products, see "Creating Simple and Complex Products" on page 39.

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1. From the application-level menu, choose View > Site Map > Catalog Administration > Catalogs.
2. In the Name field in the Catalogs list, click the name of the catalog with which you want to associate a product.
3. In the Categories list, select the category with which you want to associate a product.
4. Click the Products view tab.
5. In the Products list, click New.
6. In the Add Internal Products dialog box, enter a query for the product you want, and then click Go or Cancel.

   A dialog box appears with query results if you clicked Go, or with a list of products if you clicked Cancel.
7. Perform one of the following:
   - If the product appears in the Add Internal Products dialog box, select that product, and then click OK.

     The product is added to the catalog category.
   - If the desired product does not appear in the Add Internal Products dialog box, click New to create a new internal product.

8 In the Products list, provide information for the fields.

The following table describes some of the fields.

Field	Comments
Effective End Date	Date the product stops being available.
Effective Start Date	Date the product becomes available for use.
Product	A unique name for the product.
Sequence Number	Sequence in which products are displayed, in ascending order starting with 0.

NOTE: When you create a product in this manner, you can only create a simple product of resource type General. If you need to create a complex product or one of resource type Critical or Non-Critical, go to the Product Administration screen.

Setting Up Product Categories

In Siebel eHospitality, 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 an A/V technician.

NOTE: Products also appear as line items in the Functions form (View > Site Map > Functions > Functions > Line Items.) For more information about line items, see "Specifying Function Line Items" on page 93.

You can group products into categories and subcategories to allow you to organize and administer them. The following Siebel eHospitality categories are provided by default:

- A/V
- Beverage
- Billing
- Food
- Room Arrangement
- Special

The Special category allows you to specify unique items for an event, such as fountains, paintings, signboards, billboards, and so on.

You can create new categories or add subcategories to these categories. Subcategories can be added to any category.

NOTE: If you create a new category outside of the defaults, that category must be added to the Category List of Values (LOV). For more information about working with the LOV, 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, you can have multiple subcategories. For each subcategory, you can have multiple products. For each product, you can have multiple assets. For more information about product subcategories, see “Creating Product Subcategories” on page 38. For more information about products, see “Creating Simple and Complex Products” on page 39. For more information about assets, see “Setting Up Assets” on page 53.

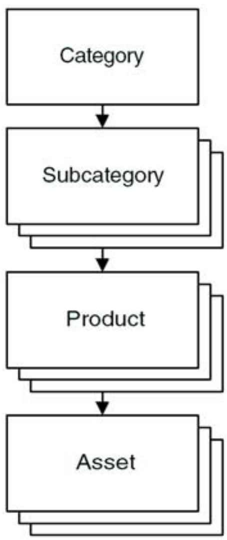


Figure 4. Relationship Between a Category, a Subcategory, a Product, and an Asset

The procedures involved in setting up product categories in Siebel eHospitality are:

- “Creating Product Categories” on page 37
- “Creating Product Subcategories” on page 38

For information about associating product subcategories with charge codes, see “Associating Charge Codes with Product Subcategories” on page 64.

Creating Product Categories

Use the Category Administration screen to group products and create product categories. Note that Category Administration within Siebel eHospitality is different from Category Administration within the standard Siebel eBusiness Applications.

To create a product category

1. From the application-level menu, choose View > Site Map > Category Administration > Category Administration.
2. In the More Info form, click New and provide information in the following fields:

Field	Comments
Category	The category with which the product is associated, for example, Beverage.
Description	A description of the category.
Name	The name of the category.
Print in SOE	When selected, causes items in the category to be included in the Schedule of Events (SOE) report. The SOE report includes everything but products of type Menu and child products of a complex parent product of type Menu. For more information about SOEs, see "Generating Schedule of Events Reports" on page 103.

3. Click the Notes view tab and enter any notes you want to associate with the category.
   - **a** In the Notes list, click New.
   - **b** Provide information in applicable fields.

NOTE: Notes are displayed under the category name in the Banquet Event Orders report and the Schedule of Events report. For more information on creating reports, see *Siebel Reports Administration Guide*.

Creating Product Subcategories

Use the Category Administration screen to create product subcategories. Later in this chapter, you associate charge codes with product subcategories. For information about associating product subcategories with charge codes, see "Associating Charge Codes with Product Subcategories" on page 64.

To create a product subcategory

1. From the application-level menu, choose View > Site Map > Category Administration > Category Administration.
2. In the Categories list, select the category with which you want to add a subcategory.
3. Click the Sub Categories view tab.
4. In the Sub Categories list, click New.
5. In the new subcategory record, enter a name and description.

Creating Simple and Complex Products

In Siebel eHospitality, 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 an A/V Projector that includes simple products such as an extension cord, a lens cap, and so on. This section describes how to create products within Siebel eHospitality. For more information about products, see *Product Administration Guide*.

Use the Product Administration screen to create simple and complex products. Use Effective Start Date and Effective End Date to denote availability of products. A product is considered discontinued if the Effective End Date has passed.

NOTE: If you need 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, or you can define the event requirements using simple products instead.

However, 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, effectively delete that product from the complex product by setting the quantity to 0.

When you create a product, you must assign it to a product subcategory, which automatically populates the product category field. If the product is available only at one location, you may want to add that product to a catalog. For example, if the product is located in San Francisco, add it to the San Francisco Property Catalog. For more information about associating products with a catalog, see "Associating Products with Catalog Categories" on page 33.

The procedures involved in defining simple and complex products in Siebel eHospitality are:

- "Creating Simple Products" on page 40
- "Creating Complex Products" on page 41

Creating Simple Products

Use the Product Administration screen to create simple products.

To create a simple product

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

2. In the More Info form, click New to create the simple product, and provide product details in the fields.

   The following table describes the fields specific to Siebel eHospitality.

Field	Comments
Category	This field is populated after you specify a subcategory.
Part Number	The part number for 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. For more information about resource types, see "Reserving Assets" on page 98.
Set-Up Time	Minutes needed to set up a product.
Sub Category	A category within a category. Choose from the picklist. When you choose the subcategory for the product, the appropriate category is populated.
Tear-Down Time	Minutes needed to tear down a product.
Type	The type of product. Choose one of the following from the picklist: Menu, Package, Split Package, and Setup Style.

For users other than the administrator to view the product, you must now associate this product with a catalog. For more information about associating a product with a catalog, see "Associating Products with Catalog Categories" on page 33.

Creating Complex Products

A complex product is a grouping of simple products or a grouping of both simple and complex products. To create a complex product, you must first define the simple products, then add more components to the simple product.

Use the Customizable Product view tab in the Product Administration screen to create and validate complex products. Because there are many steps needed for creating a complex product, the procedures are divided into two phases as follows:

- "Phase 1: Preparing to Create a Complex Product"
- "Phase 2: Creating a Complex Product"

Complete the phases in the order provided.

Phase 1: Preparing to Create a Complex Product

This phase prepares you for complex product creation.

NOTE: The following procedure assumes the simple products that you want to make up the complex product are already defined. For information about creating simple products, see "To create a simple product" on page 40.

To prepare for creating a complex product

1. From the application-level menu, choose View > Site Map > Product Administration > Product Administration.
2. In the Products list, select the product with which you want to base the complex product, and then click the Customizable Product view tab.
3. From the drop-down menu in the Lock/Unlock Product list, choose Create Workspace.
4. In the Lock/Unlock Product list, click the Locked Flag field to lock the product.

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

You are now ready for "Phase 2: Creating a Complex Product."

Phase 2: Creating a Complex Product

This phase describes how to finish the complex product creation.

To finish creating the complex product

1 From the Show drop-down list, choose Product Designer.

2 In the Product Designer list, click New.

3 In the Product field in the Product Designer List, click the select button.

4 In the Pick Product dialog box, select one of the products, and then click OK.

> **NOTE:** You can choose either a simple or complex product.

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

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 Step 2 through Step 5 for each product you want in the complex product.

6 From the Show drop-down list, choose Product Versions.

7. Optional: 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 Show drop-down list, choose Product Designer, make the necessary changes, and then repeat Step 6 and Step 7 until the information is correct.
   - d. If no changes are required, click Done.

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

   ---

8. 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.

Creating Price Lists

Use price lists to set prices for line items for orders. Each price list can specify more than one kind of pricing, for example, list price, promotional pricing, and so on.

The only difference from standard Siebel eBusiness Applications functionality is in how price lists are associated with events. In Siebel eHospitality, price lists can be set up for a variety of uses, for example, by property (SF Hotel Price List), by account (Siebel Systems), by product type (A/V), time of year (SF Hotel Spring Break Price List), and so on.

By default, event orders are associated with the event property's default price list, however, each order can be associated with a different price list if desired. For more information about specifying an order's price lists, see "Creating Orders" on page 88. For general information about price list, see *Pricing Administration Guide*.

The following subsections describe how to define price lists and associate price lists with properties:

- "Defining Price Lists" on page 45
- "Associating Price Lists with Properties" on page 47

Defining Price Lists

Use the Pricing Administration screen to define price lists.

To define a price list

1. From the application-level menu, choose View > Site Map > Pricing Administration > Price List.
2. In the More Info form, click New to create a new price list, and provide information in 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 you first create a new price list.
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.
Name	The name of the price list.
Organization	The organization associated with this price list.
Payment Terms	Set of payment terms associated with this price list. This selection appears as the default data for Payment Terms when a user creates an order that specifies this price list.
Pricing Model	The pricing model associated with this 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.
Shipping Method	The shipping method associated with this price list. This appears as the default Shipping Method when a user creates an order that specifies this price list.

Field	Comments
Shipping Terms	Indicates one default shipping charge protocol associated with the price list. This appears as the default Shipping Terms data when a user creates an order that specifies this price list.
Updated By	The login ID of the person who last updated the record.

3. With this new price list record still selected, click the Price List Line Items view tab.
4. In the Price List Line Items list, click New to add a product to the price list.

NOTE: The following steps assume the products are already defined. If not, see "Creating Simple and Complex Products" on page 39.

5. In the Add Internal Products dialog box, select the Product you want to add, and then click OK.
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 4 through Step 6 for each product you want to add.

Associating Price Lists with Properties

After a price list is defined, you can associate it with a particular property, but only one price list can be associated with each property. For example, you need to have have one price list for the San Francisco-Fisherman's Wharf location and another price list for the San Francisco-Union Square location. Use the Property Administration screen to associate a price list with a property.

To associate a price list with a property

1. From the application-level menu, choose View > Site Map > Property Administration > All Properties.
2. In the Properties list, select the property with which you want to associate a price list.
3. In the Price List field in the More Info view tab, click the select button.
4. Select the Price List you want to associate with the property, and then click OK.

   The price list associated with the property becomes the default price list for events held at that property and is automatically associated with any orders created for that event.

Setting Up Properties

Properties are locations where events are held. Multiple rooms, team members, and taxes can be associated with each property. An event can be associated with only one property.

The procedures involved in setting up properties in Siebel eHospitality are:

- "Adding Properties"
- "Adding Rooms for Properties" on page 49
- "Setting Up Property Teams" on page 50
- "Associating Taxes with Properties" on page 52

Adding Properties

Use the Property Administration screen to add properties.

To add a property

1. From the application-level menu, choose View > Site Map > Property Administration > All Properties.
2. In the More Info form, click New to create a new property, and provide information in the fields.

   The following table describes some of the fields.

Field	Comments
Currency	The currency of the property. The field's default value is the application's currency.
Location	Geographic area where the property resides.
Name	The name of the property.

Field	Comments
Price List	The price list associated with this property. For events held at a given property, the price list associated with the property becomes the default price list for events held at that property and is automatically associated with any orders created for that event.
Property Team	The team assigned to this location. For more information about property teams, see "Setting Up Property Teams" on page 50.
URL	If appropriate, provide a URL for the property.

Adding Rooms for Properties

Use the Properties Administration screen to add rooms to properties.

To add a room for a property

1. From the application-level menu, choose View > Site Map > Property Administration > All Properties.
2. In the Properties list, select the property with which you want to add a room.
3. Click the Rooms view tab.
4. In the Rooms list, click New to create a new record, and then provide information in the following fields:

Field	Comments
Basis	Indicates how the rate for the room is applied, for example hourly or daily.
Capacity	The number of people the room can hold.
Name	The name of the room.
Rate	The cost for the room.

Field	Comments
Size	The size of the room.
Type	The type of room. Choose from a picklist, for example, conference room, hotel room, and so on.

Setting Up Property Teams

After you add a property, you assign individual employees to a team that is associated with the property.

The following subsections describe how to assign, remove, and view property teams:

- "Assigning an Employee to a Property Team"
- "Removing an Employee from a Property Team"
- "Removing an Employee from a Property Team"

Assigning an Employee to a Property Team

Use the More Info view in the Property Administration screen to assign employees to property teams.

To assign an employee to a property team

1. From the application-level menu, choose View > Site Map > Property Administration > All Properties.
2. In the Properties list, select the property with which you want to add an employee to the team.
3. In the Property Team field in the More Info view, click the select button.
4. In the Account Team Members dialog box, click New.

5 In the Account Team Members list, select the employee you want on the team, click Go, and then click OK.

> **NOTE:** You can add several employees at the same time by pressing the CTRL key while selecting.

Removing an Employee from a Property Team

Use the More Info view in the Property Administration screen to remove employees from property teams.

To remove an employee from a property team

1 From the application-level menu, choose View > Site Map > Property Administration > All Properties.

2 In the Properties list, select the property with which you want to remove an employee from the team.

3 In the Property Team field in the More Info view, click the select button.

4 In the Account Team members dialog box, select the team member you want to remove, and click Delete.

Repeat Step 4 for each member you want to remove.

Viewing Property Team Members

Use the Property Administration screen to view property team members.

To view team members assigned to a property

1 From the application-level menu, choose View > Site Map > Property Administration > All Properties.

2 In the Properties list, select the property with which you want to view team members.

3 Click the Property Team view tab.

A list of property team members appears. This view is read-only.

Associating Taxes with Properties

After you list a property, you can associate taxes with that property. Use the Tax Administration screen to associate taxes with a property.

NOTE: The following procedure assumes the taxes that you want to associate with the property are already defined. For information about defining taxes, see "Defining Taxes" on page 60.

To associate a tax with a property

1. From the application-level menu, choose View > Site Map > Tax Administration > Taxes.
2. In the Taxes list, select the tax that you want to associate with a property.
3. Click the Properties view tab.
4. In the Properties list, click New.
5. In the Add Properties dialog box, select the property you want to associate with the tax, and then click OK.

   Repeat Step 4 and Step 5 until all applicable taxes are associated.

Setting Up Assets

An asset is a specific physical instance of a product. End users reserve assets, not products. You can associate an asset with a specific property. You can also have multiple assets associated with a single product. For example, you might create a product 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.

The following subsections describe how to create assets and associate assets with properties within Siebel eHospitality:

- "Creating Assets" on page 54
- "Associating Assets with Properties" on page 55

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*.

Creating Assets

Use the Assets screen to create assets.

To create an asset

1. From the application-level menu, choose View > Site Map > Assets > All Assets.
2. In the More Info form, click New to create a new asset, and provide information in 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.
Category	The category the asset is associated with. A picklist provides predefined categories.
Install Date	The default is the date the asset was 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, Consigned.
Part #	The part number for the asset. This field is automatically populated when a product is selected if the product had this field filled in when it was created.
Product	The product the asset is associated with.
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 Number	The serial number of the asset.

Field	Comments
Status	Indicates the status for the asset, for example Available, Active, and so on.
Type	The type of asset. This field is automatically populated when a product is selected if the product had this field filled in when it was created

Associating Assets with Properties

After you define assets, you can associate an asset with a specific property. The property with which the asset is associated can, however, be changed at any time.

To associate an asset with a property

1. From the application-level menu, choose View > Site Map > Assets > All Assets.
2. In the All Assets list, click the asset with which you want to associate a property.
3. In the More Info form, click the show more button to display additional fields.
4. In the Property Site field in the More Info form, click the select button.
5. In the Pick Properties dialog box, select the property where the asset will be located, and click OK.

Defining Charge Codes, Taxes, and Service Charges

This section describes charge codes, taxes, and services charges and their relationship to each other as well as to products and properties.

In Siebel eHospitality, 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 link the taxes and the service charges to products by way of product categories and subcategories.

Charge codes can be associated with multiple taxes and multiple service charges. Service charges can also be associated with multiple taxes. 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, you might have a charge code that is 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). Figure 5 shows how a local charge code is related to the taxes, service charges, and properties associated with that charge code. Similar relationships exist for other kinds of charge codes.

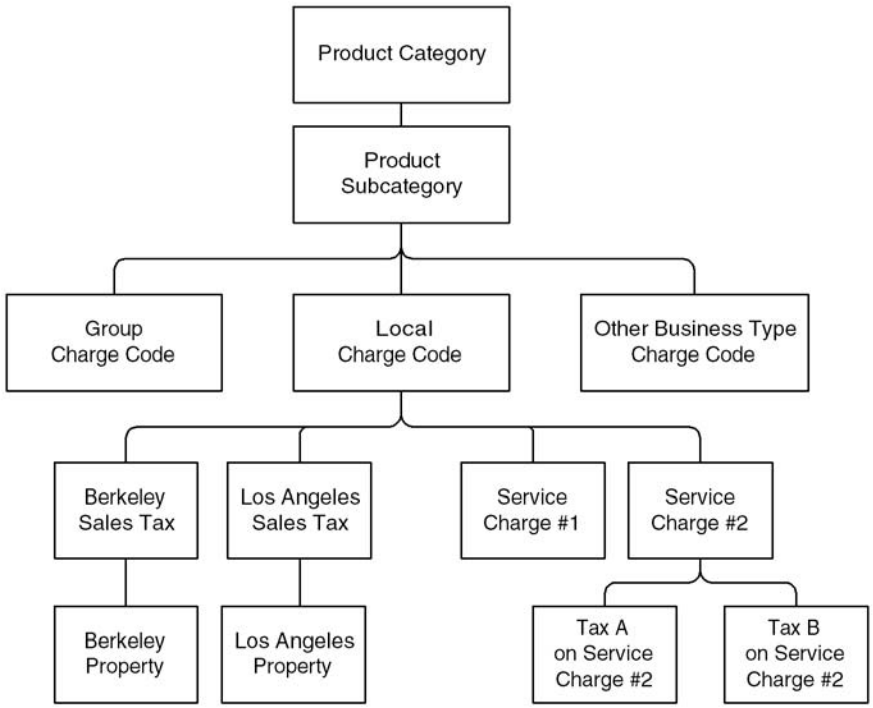


Figure 5. Relationship Between Charge Codes, Taxes, Service Charges, and Properties

Use the Tax Administration screen to define charge codes, taxes, and service charges. The procedures involved are:

- "Defining Charge Codes" on page 58
- "Defining Taxes" on page 60

- "Defining Service Charges" on page 61

TIP: It is recommended that, to the extent possible, you define charge codes, taxes, and service charges before creating associations between these entities.

For more information about charge codes, taxes, and service charges and their relationships, see "Associating Charge Codes, Taxes, and Service Charges" on page 63.

Defining Charge Codes

A charge code is an identifier that links taxes and service charges to products and 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 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.

NOTE: 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*.

Use the Tax Administration screen to associate charge codes with subcategories.

To define a charge code

1. From the application-level menu, choose View > Site Map > Tax Administration > Charge Codes.
2. In the More Info form, click New, and provide information for the fields.

   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	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	Date the charge code becomes active.

After charge codes are defined, you must associate the charge codes with product subcategories. For more information about associating charge codes with subcategories, see "Associating Charge Codes with Product Subcategories" on page 64.

Defining Taxes

You must define taxes before they can be associated with charge codes, service charges, and properties. When you define taxes, you can enter either a percentage (Percent field) or a flat fee (Amount field). Only one of these fields can be used per tax.

Use the Tax Administration screen to define taxes.

To define a tax

1. From the application-level menu, choose View > Site Map > Tax Administration > Taxes.
2. In the More Info form, click New and provide information about the tax.

   The following table describes some of the fields.

Field	Comments
Amount	Tax defined as a flat fee. The flat fee is a pre-set amount.
Currency	The currency of the tax. Defaults to the default currency of the application.
End Date	Date the tax becomes inactive.
Percent	Tax defined as a percentage. The amount of tax charged will be this percentage times the price for the line item.
Start Date	Date the tax becomes active.

After taxes are defined, you can associate taxes with properties or service charges. For more information about associating taxes with properties, see "Associating Taxes with Properties" on page 52. For information about associating taxes with a service charge, see "Defining Service Charges" on page 61.

Defining Service Charges

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 that 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.

In this section, you specify which service charges are taxable. Use the Tax Administration screen to define and associate taxes with service charges.

To define a service charge

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

2 In the More Info form, click New.

3 In the new service charge record, provide information for the fields.

The following table describes some of the fields.

Field	Comments
Amount	Service charge based on a flat fee. The flat fee is a preset amount.
End Date	Date the service charge becomes inactive.
Percent	Service charge based on a percentage. The amount of service charges will be based on this percentage times the price for the line item.
Start Date	Date the service charge becomes active.
Taxable	Indicates whether or not the service charge is taxable.

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

4 If the service charge is taxable, click Taxable, and then click the Taxes view tab to specify the taxes that apply to this service charge.

a In the Taxes list, click New.

b From the Add Taxes dialog box, select the tax and click OK.

NOTE: Taxes do not apply unless the Taxable flag is selected.

Associating Charge Codes, Taxes, and Service Charges

Now that you have defined charge codes, service charges, and taxes, you can associate them with products. Make these associations in the Category Administration screen.

Keep in mind the following constraints when making the associations:

- Make sure the correct business type is assigned to the charge code.
- Make sure taxes are valid for the specified time period.

The following subsections are described in this section:

- "Associating Charge Codes with Product Subcategories"
- "Associating Taxes with Charge Codes" on page 65
- "Associating Service Charges with Charge Codes" on page 66

Associating Charge Codes with Product Subcategories

Charge codes are associated with product subcategories to link products to service charges and taxes for invoice calculations. The charge code can also be used for analysis purposes outside of the Siebel application.

A charge code can only be associated with one subcategory. Use the Charge Code view in the Category Administration screen to associate charge codes with subcategories.

To associate a charge code with a product subcategory

NOTE: This procedure assumes the charge code and subcategory you want to use are already defined. For information about defining charge codes, see "Defining Charge Codes" on page 58. For information about product subcategories, see "Creating Product Subcategories" on page 38.

---

1. From the application-level menu, choose View > Site Map > Category Administration > Category Administration.
2. In the Categories list, select the category with which you want to associate a charge code.
3. Click the Charge Codes view tab.
4. In the Charge Codes list, click Query, and then select an existing charge code.

   Repeat this step for each tax you want to associate with the charge code.

Associating Taxes with Charge Codes

You can associate multiple taxes with a single charge code. Use the Tax Administration screen to associate taxes with charge codes.

To associate a tax with a charge code

NOTE: This procedure assumes the tax and the charge code that you want to associate are already defined. For information about defining charge codes and taxes, see“To define a charge code” on page 59 and “To define a tax” on page 60.

---

1. From the application-level menu, choose View > Site Map > Tax Administration > Charge Codes.
2. In the Charge Codes list, select the charge code with which you want to associate a tax.
3. Click the Taxes view tab.
4. In the Taxes list, click New.
5. In the Add Taxes dialog box, select the tax you want to associate with the charge code.

   Repeat this step for each tax you want to associate with the charge code.

Associating Service Charges with Charge Codes

Multiple service charges can be associated with a single charge code, and a service charge can be associated with multiple charge codes. Use the Charge Codes view in the Tax Administration screen to associate charge codes with service charges.

NOTE: The following procedure assumes the charge code and the service charges that you want to associate are already defined. For information about defining charge codes and service charges, see "To define a charge code" on page 59 and "To define a service charge" on page 61.

To associate a charge code with a service charge

1. From the application-level menu, choose View > Site Map > Tax Administration > Charge Codes.
2. In the Charge Codes list, select the charge code with which you want to associate a service charge.
3. Click the Service Charges view tab.
4. In the Service Charges list, click New.
5. In the Add Service Charge dialog box, select the service charge you want to associate with the charge code.

   Repeat this step for each service charge you want to associate with the charge code.

Using Siebel eHospitality Before Events 4

This chapter describes the procedures that events managers and operations personnel would use to plan and prepare for an event, using uncustomized Siebel eHospitality software. Where the procedures are unique to Siebel eHospitality, this chapter describes them in detail. Where the procedures match the functionality of standard Siebel eApplications, this chapter provides cross-references to other manuals.

Prior to customizing eHospitality, applications developers should review this chapter and Chapter 5, "Using Siebel eHospitality After Events," to gain an understanding of how the product is intended to be used in its standard configuration.

In ordinary circumstances, the procedures in Chapter 3, "Setting Up Siebel eHospitality," must be completed before the procedures in this chapter can be used.

Chapter 5, "Using Siebel eHospitality After Events," describes procedures that events operations personnel would use to follow up after an event, including procedures for working with invoices.

For a scenario that describes the business use of the procedures in this chapter, see "Business Scenario" on page 17.

Using the eHospitality Home Page

When a user logs in to the Siebel eHospitality application, the eHospitality home page appears.

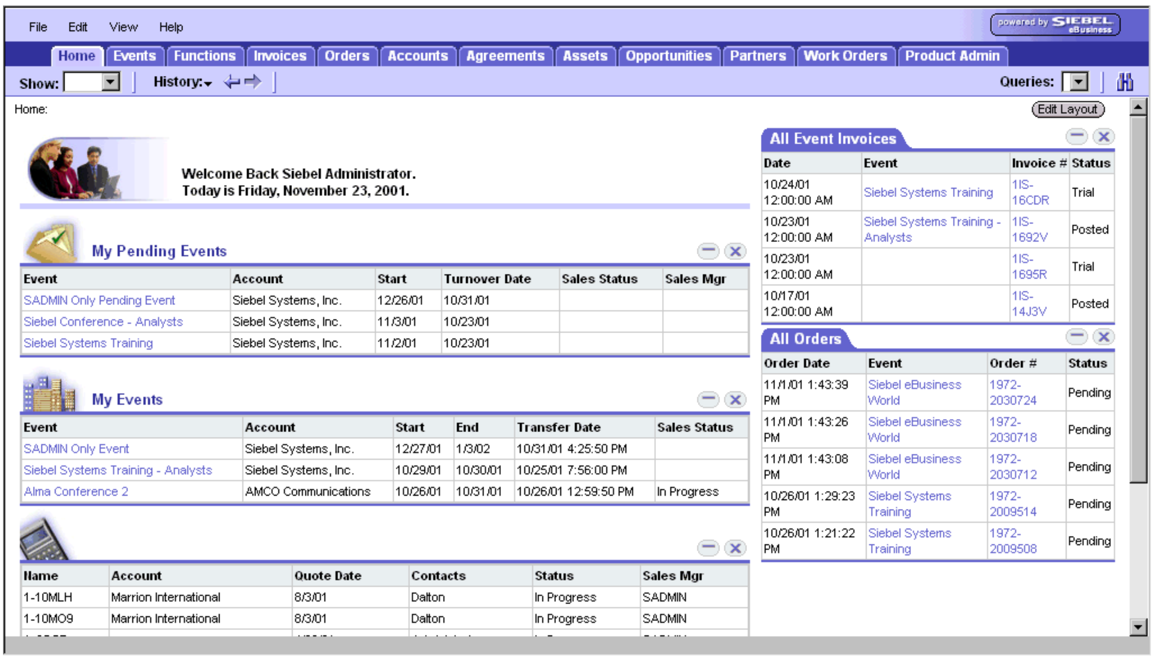


Figure 6. Siebel eHospitality home page

The purpose of the home page is to alert users to recent status changes and provide quick access to other views with additional functionality. The home page displays the following lists:

- My Pending Events
- My Events
- My Quotes
- My Current Activities

- All Event Invoices
- All Orders

To accommodate this information on one screen, each list on the home page displays a maximum of five records. The following criteria determine which records are displayed:

- Search criteria for the list and the business component associated with the list. For example, My Pending Events records must have Status = Pending.
- Sort criteria for the business component associated with the list. For example, My Pending Events is associated with the SHM Transfer Event business component, which is sorted by Turnover Date, in descending order, so that most recent dates are shown first. Sort criteria can be modified in Siebel Tools.
- If more than five records satisfy the list's search criteria and have the same values for the business component's sort criteria, the records that are displayed are determined by the method the database uses to retrieve records.

Lists on the home page do not contain Previous and Next buttons to allow users to scroll through additional records. The following procedure describes how to view additional records for any home page list.

To view additional records for a list on the home page

- From the Siebel eHospitality home page, click any hyperlink in the list that interests you, or click the title of the list. Depending on which list you choose, a different screen appears, containing additional information and providing Previous and Next buttons for list scrolling. Table 3 shows the lists and forms displayed for each home page hyperlink clicked.

Table 3. Destinations of eHospitality Home Page Links

List Title or Hyperlink Clicked	Lists and Forms Displayed
My Pending Events (title)	Events list, More Info form, using My Events filter
My Pending Events (Event field)	Events form, Functions list
My Pending Events (Account field)	Account form, Contacts list

Table 3. Destinations of eHospitality Home Page Links

List Title or Hyperlink Clicked	Lists and Forms Displayed
My Events (title)	Events list, More Info form, using My Events filter
My Events (Event field)	Events form, Functions list
My Events (Account field)	Account form, Contacts list
My Quotes (title)	Quotes list, More Info form, using My Quotes filter
My Quotes (Name field)	Quote form, Line Items list, Totals subview form
My Quotes (Account field)	Account form, Contacts list
My Quotes (Contacts field)	Contact form, Activities list
My Current Activities (title)	Activities list, More Info form, using My Activities Filter
My Current Activities (Activity Type field)	Activity form, Attachments list
All Event Invoices (title)	Event Invoice list, More Info form, using All Invoices filter
All Event Invoices (Event field)	Events form, Event Invoices list
All Event Invoices (Invoice # field)	Event Invoice form, Line Items (Guest) list
All Orders (title)	Service Orders list, More Info form, using All Service Orders filter
All Orders (Event field)	Events form, Orders list
All Orders (Order # field)	Service Order form, Line Items list, Totals subview form

Describing Pending Events

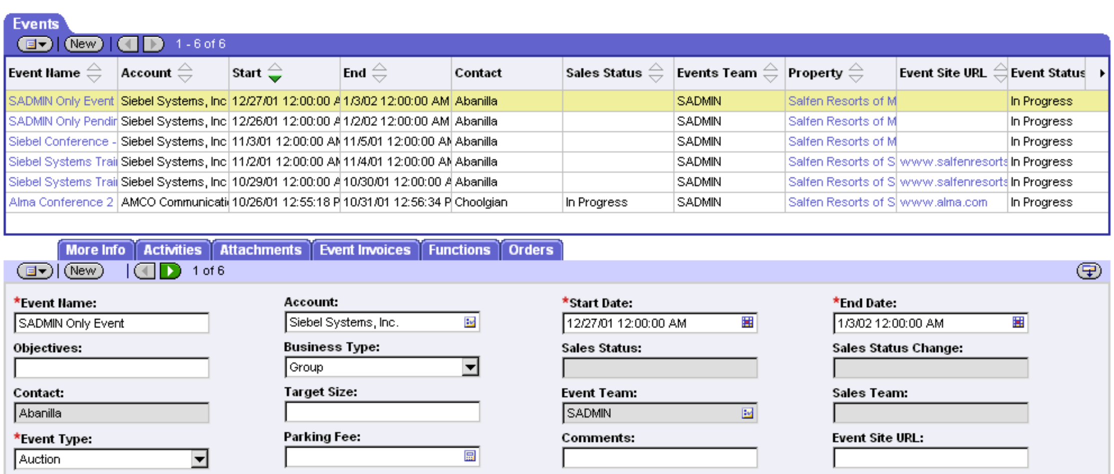
Siebel eHospitality is designed primarily for the use of event management and event operations personnel. This guide concentrates on event-related activities that begin with an event manager accepting or rejecting responsibility for a pending event (an event proposed by event sales personnel).

The following procedure describes how an event salesperson can specify information about a proposed event, so that an events manager can accept or reject the event.

To specify information about a proposed event

1 Navigate to the Events screen.

2 Click the More Info view tab.



3 In the More Info form, click the show more button to display additional fields.

4 Click New, and then complete the fields in the More Info form; some fields are described in the table that follows this procedure.

5 If you have not already done so, use the following substeps to add the person who should review the proposed event to the Event Team.

a In the Event Team field, click the select button to display a dialog box that lists current event team members.

b Click New to display a list of potential event team members.

c Select the listing for the desired new member and click OK to add that person to the current event team.

d Click Close to close the dialog box and return to the Events list and More Info Form.

6 If you are ready to transfer the proposed event to events management personnel for review, set Transfer Status to Pending.

Field	Comments
Account	The customer organization for the event.
Attendance Type	Expected composition of the audience for the event. By default, available values are All VIPs, General, and Mixed VIPs. Available values are stored in the SHM_ATD_TYPE_CD list of values (LOV).
Booking #	Unique identifying number of a sales quote associated with the event, if the system includes quote capability.
Business Type	The industry or business type of the customer organization.
Comments	Lets event management personnel indicate a reason for rejecting a pending event. Typical reasons for rejecting an event include not being able to meet event requirements at the proposed property, or needing more information from event sales personnel before a decision can be reached.
Contact	Stores contact information for one or more people in the customer organization. Automatically populated based on account.
End Date	Final date and ending time of the event. You must specify the date. You are not required to specify the time, but if you do not do so, an arbitrary time is automatically assigned. This time is not used in any calculations, but should be entered correctly in order to provide correct information to events personnel.
Event Site URL	Link to a Web site that provides information about the selected event.
Event Team	Persons responsible for executing the proposed event. Anyone on the event team can accept or reject a pending event.

Field	Comments
Event Type	Describes the general nature of the event. Available values are stored in the EVENT_FORMAT LOV. By default, the following values are available: Auction, Benefit, Conference, Cultural, Demonstration, Fundraiser, General, Meeting, Presentation, Restricted, Seminar, and Trade Show.
Objectives	Customer's objectives for the event.
Parking Fee	Parking fee for the event. This is a currency field.
Property	Location for the event.
Sales Creation Date	Automatically populated from sales quote, if present, when Booking # is specified.
Sales Status	Automatically populated from sales quote, if present.
Sales Status Change	Automatically populated from sales quote, if present, when Booking # is specified.
Sales Team	Members of your organization involved in the event sale. Automatically populated from sales quote, if present, when Booking # is specified.
Start Date	First date and starting time of the event. You must specify the date. You are not required to specify the time, but if you do not do so, an arbitrary time is automatically assigned. This time is not used in any calculations, but should be entered correctly in order to provide correct information to events personnel.
Target Size	The expected number of people who will attend the event.
Transfer Date	Date on which events manager accepts responsibility for the proposed event. Populated automatically when Transfer Status is changed to Accepted or Assigned.
Transfer Status	Indicates whether event management personnel have accepted responsibility for the event. Event sales personnel should set the value of this field to Pending when ready for event management review. This causes the event to be listed in My Pending Events on the home page of Event Team members. Event management personnel should set the value to Accepted or Assigned if they accept responsibility for executing the event. At that time, the event listing moves to the My Events list. If the value is set to Rejected, the event disappears from home page lists. The Comments field should be used to indicate why an event is rejected.

Reviewing Pending Events

Events managers use Siebel eHospitality to review information about events that event sales representatives are discussing with potential customers. Events managers can accept or reject each pending (proposed) event.

Reviewing Currently Pending Events

The following procedure describes how to get basic information about currently proposed events.

To review information about all pending events

1. Navigate to the home page for the Siebel eHospitality application.
2. Inspect the information in the My Pending Events list, which displays up to five proposed events that have been assigned to you for review.
3. Click the Events screen tab to display an Events list and a More Info form.
4. In the Show drop-down list, click All Events.
5. In the More Info form, click the show more button to display additional fields.
6. Use the following substeps to query for all pending events.
   - **a** Still in the More Info form, click the menu button and choose New Query.
   - **b** In the Transfer Status field, choose Pending.
   - **c** Click Go to display a list of all pending events.
7. Optional: If you want to display only pending events for which you are a member of the Event Team, use the following substeps to refine your query.
   - **a** Click the menu button and choose Refine Query.
   - **b** In the Event Team field, enter your own User ID.
   - **c** Click Go to display a list of pending events for which you are a member of the Event Team.

Reviewing More Detailed Information About a Pending Event

The following procedure describes how to get more detailed information about a specific proposed event.

To review information about a specific proposed event

1. Complete all steps in "To review information about all pending events" on page 74.
2. In the Events list, select the event that interests you.
3. Click the Functions view tab to display an Event form and a Functions list.
4. Inspect the currently proposed information about the selected event and its functions.

   You may want to pay particular attention to start and end dates, expected attendance (Target Size), proposed location (Property), and the number and types of functions associated with the event.
5. In the Show drop-down list, click Event Calendar.
6. Inspect the appropriate dates in the calendar, to make sure that the proposed event does not conflict with existing commitments.

Reviewing Information About Pending Event Functions

The following procedure describes how to get detailed information about functions that are associated with a specific proposed event.

To review information about functions associated with a proposed event

1. Complete all steps in "To review information about a specific proposed event" on page 75.
2. In the Functions list, click the Function Type hyperlink to display more information about any function that interests you.
3. In the Function form, click the show more button to display additional fields of function information.

4 Inspect the currently proposed information about the selected function.

You may want to pay particular attention to date, start and end times, expected attendance (Expected), and proposed location (Property).

Accepting or Rejecting a Pending Event

The following procedure describes how to accept or reject responsibility for a proposed event.

To accept or reject a proposed event

1. Complete all steps in "To review information about all pending events" on page 74.
2. In the Events list, select the event you want to accept or reject.
3. In the Transfer Status field in the More Info form, click an appropriate value:
   - Click Accepted or Assigned to accept responsibility for the event.
   - Click Rejected to decline responsibility for the event.
4. If you rejected the event, enter the reason for the rejection in the Comments field.

   Typical reasons might include not being able to meet event requirements at the specified location, or needing more information about event requirements.

After a user accepts a proposed event, the event listing moves from the My Pending Events list on the Siebel eHospitality home page to the My Events list on the home page for all users who are listed in the Event Team field. If, instead, a user rejects a proposed event, the event listing disappears from the eHospitality home page for all event team members, but remains visible in the All Events view of the Events screen.

Specifying Event Details

A proposed event may have a relatively small number of details specified, such as dates for the event and anticipated size and type of attendance. Event details can be added either before or after the proposed event is accepted. Some details can be specified in the More Info form for the selected event. Other details, such as event preparation activities and documents related to the event, are specified in other locations.

Specifying Activities

Many activities are involved in the successful planning and execution of an event. The following procedure summarizes the steps for specifying the necessary activities for an event. The Activities list for Siebel eHospitality uses standard Siebel fields and procedures for activities. For more information about these fields and procedures, see *Siebel Call Center User Guide* or *Siebel Sales User Guide*.

To specify event activities

1. Navigate to the Events screen.
2. Select the event for which you want to specify activities.
3. Click the Activities view tab.
4. In the Activities list, click New to display a new record, and then complete the fields.

   Repeat this step for each activity you want to specify.

Storing Event-Related Files

As part of specifying details for the event, events planners may want to store attachment files such as contracts or maps of exhibition displays. The following procedure summarizes the steps for storing a file attachment. The Attachments list for Siebel eHospitality uses standard Siebel fields and procedures for attachments. For more information about attachments, see *Fundamentals*.

To store an attachment file that is related to an event

1. Navigate to the Events screen.

2. Select the event for which you want to store an attachment.
3. Click the Attachments view tab.
4. In the Attachments list, click New to display a new record, and then complete the fields.

The following procedure describes how to view an attachment.

To view an attachment file that is related to the event

1. Navigate to the Events screen.
2. Select the event for which you want to store an attachment.
3. Click the Attachments view tab.
4. In the Attachments list, click the name of the attachment you want to view.
5. In the File Download dialog box, choose one of the following alternatives, then click OK.
   - Open this file from its current location
   - Save this file to disk

Attachments can also be stored and viewed for specific functions within an event.

Creating Functions

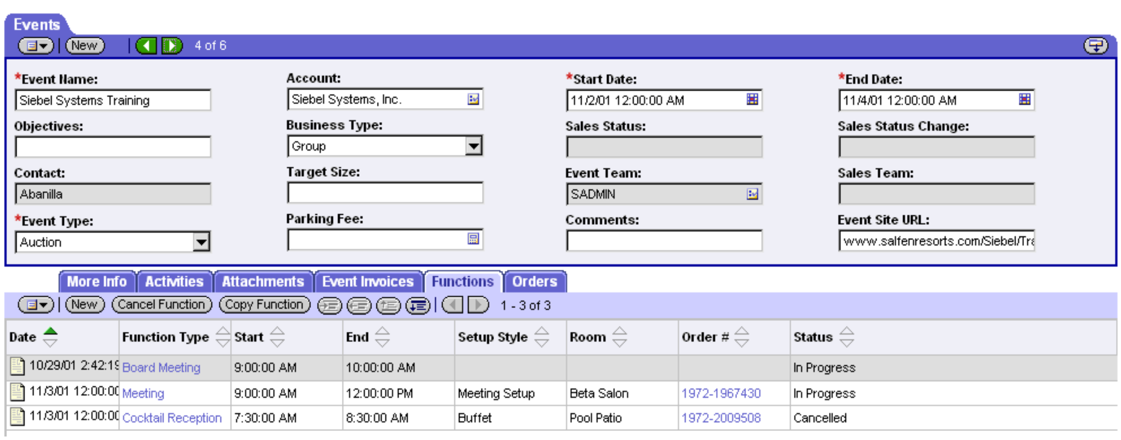
A proposed event may have few or many details specified about the functions that will make up the event. Functions and function details can be added either before or after the proposed event is accepted. This section includes information about creating functions, specifying function details, designating some activities as subfunctions, and copying recurring functions for increased efficiency.

Adding a Function to an Event

The following procedure describes how to add a function to an event.

To add a function to an event

1. Navigate to the Events screen.
2. Select the event for which you want to add a function.
3. Click the Functions view tab to display the Functions list.



4 In the Functions list, click New to create a blank record, and then complete the fields; some fields are described in the following table.

Additional fields are described in the following procedure, "To specify additional details about a function" on page 81.

Field	Comments
Date	Date and time that the function will be held. You must specify the date. You are not required to specify the time in this field, but if you do not do so, an arbitrary time is automatically assigned. The time value in this field is not used for operations such as reserving assets for the function—instead, the time specified in the Start field is used.
End	Ending time for the function.
Function Type	Type of function. Available values are stored in the SHM_EVENT_TYPE_CD LOV. By default, available values include Board Meeting, Breakfast, Breakout, Brunch, Cocktail Reception, Coffee Break, Dance, Demo, Dinner, Entertainment, Exhibition, Exhibits, General Session, Keynote Address, Lecture, Lunch, Meeting, Off-Site, Panel Discussion, Presentation, Reception, Registration, Sporting Event, Trade Show, and Workshop.
Order #	The identifying number for the order that lists the goods and services to be supplied for the selected function. Available values are orders associated with the parent event for the function. If the selected function has subfunctions at the time when the order number is chosen, the function's order number is assigned to all of that function's subfunctions, automatically. (This may not be visible until the display is refreshed.) If the function's order number is changed at a later time, the new order number is assigned to all of the function's subfunctions, automatically, regardless of the previous order number values for the subfunctions. For more information about creating orders, see "To create an order" on page 88. For more information about subfunctions, see "Working with Subfunctions" on page 84.
Room	Room where the function will be held. Available values depend on the property (location) where the function will be held. For more information about properties and rooms, see "Defining Charge Codes, Taxes, and Service Charges" on page 56.

Field	Comments
Sequence	A read-only field automatically populated with information concerning function and subfunction relationships. This field is not shown by default in the Functions List, but can be shown using the Columns Displayed command.
Setup Style	Groups of products required for setting up the function. A value for Setup Style cannot be chosen until an order number has been assigned to the selected function. Available values for Setup Style are administrator-defined complex products. For example, a Setup Style called Boardroom might contain the following products: long table, refreshment table, pads, pens, candy, and executive chairs. When a Setup Style is chosen for a function, the setup style is automatically included as an expandable line item for the function and its corresponding order. When a Setup Style is expanded in a line item list, the individual components of the complex product are displayed as subsidiary line items. If the Setup Style is changed at a later time, the subsidiary line items for the old value are replaced automatically by line items for the new value.
Start	Starting time for the function.
Status	Status of the function. If a value of Cancelled is chosen, no line items can be added to the function, reserved line item resources with a status of Booked are released, and line items for the cancelled function do not appear on event checks.

Specifying Function Details

Function records are created in the Events screen, but it is most convenient to specify additional function details using the Functions screen, as described in the following procedure:

To specify additional details about a function

1. If you have not already done so, navigate to the Events screen.
2. Select the event that includes the function for which you want to specify additional details.
3. Click the Functions view tab to display the Functions list.

4 In the record for the Function that interests you, click the hyperlink in the Function Type field.

5 In the Function form, click the show more button to display additional fields.

6 Complete the fields in the Function form; some fields are described in the following table.

Field	Comments
Actual	Number of attendees for which the customer is invoiced. Automatically populated with the higher of the values in the Guaranteed and Served fields.
Banquet Lead	When selected, indicates that the function was added by staff other than the event planning team, usually during the event. For example, an event customer might ask a waitress to arrange an impromptu dinner party during the event.
Comments	Provides a location any information about the function not covered in other fields. Not used in reports.
Cumulative Price	Sum of the allocated prices for line items associated with the function. The value in this field is calculated automatically as line items are added. For more information about line items, see "Specifying Function Line Items" on page 93.
Date	Date and time that the function will be held. You must specify the date. You are not required to specify the time in this field, but if you do not do so, an arbitrary time is automatically assigned. The time value in this field is not used for operations such as reserving assets for the function—instead, the time specified in the Start field is used.
Description	Description of the function. Not used in reports.
Discount %	Discount applied to all line item prices for the selected function. Separate discounts can be applied to each individual line item or to an entire order.
Display Name	Name of the function to be displayed in reports. Defaults to the value of Function Type chosen in the Functions list in the Events screen.
End	Ending time for the function. Automatically populated from the Functions list in the Events screen.
Expected	Initial number of attendees estimated by the customer.

Field	Comments
Function Type	Type of function. Available values are stored in the SHM_EVENT_TYPE_CD LOV. By default, available values include Board Meeting, Breakfast, Breakout, Brunch, Cocktail Reception, Coffee Break, Dance, Demo, Dinner, Entertainment, Exhibition, Exhibits, General Session, Keynote Address, Lecture, Lunch, Meeting, Off-Site, Panel Discussion, Presentation, Reception, Registration, Sporting Event, Trade Show, and Workshop.
Guaranteed	Number of attendees the customer commits to pay for. This number is ordinarily agreed upon a certain number of hours before the event.
Objective	Event customer's objective for the selected function.
Order #	The identifying number for the order that lists the goods and services to be supplied for the selected function. Available values are orders associated with the parent event for the function. An order number must be specified before line items can be added to a function. It can be specified either here in the Function form or in the Functions list for the parent Event. If the selected function has subfunctions at the time when the order number is chosen, the function's order number is assigned to all of that function's subfunctions, automatically. (This may not be visible until the display is refreshed.) If the function's order number is changed at a later time, the new order number is assigned to all of the function's subfunctions, automatically, regardless of the previous order number values for the subfunctions. For more information about creating orders, see "To create an order" on page 88. For more information about subfunctions, see "Working with Subfunctions" on page 84.
Projected	Read-only field with value based on the value of the Expected field. Used for calculation of totals for line items that are specified on a per person basis.
Property	Location for the function. Automatically populated from parent event setting.
Room	Room where the function will be held. Automatically populated from the Functions list in the Events screen. Available values depend on the property (location) where the function will be held. For more information on properties and rooms, see "Defining Charge Codes, Taxes, and Service Charges" on page 56.
Served	Number of people actually served during the function.

Field	Comments
Set	Estimated number of attendees for the function. This value is used by event operations staff to prepare for and set up the function, but is not used in any calculations. An event manager supplies this value.
Setup Style	Groups of products required for setting up the function. Automatically populated from the Functions list in the Events screen. A value for Setup Style cannot be chosen until an order number has been assigned to the selected function. Available values for Setup Style are administrator-defined complex products with a Type value of Setup Style. For example, a Setup Style called Boardroom might contain the following products: long table, refreshment table, pads, pens, candy, and executive chairs. When a Setup Style is chosen for a function, the Setup Style is automatically included as a line item in the corresponding order for the function. If the Setup Style is changed at a later time, corresponding changes are automatically made to the associated line items.
Start	Starting time for the function.
Status	Status of the function. If a value of Cancelled is chosen, no line items can be added to the function, and reserved line item resources with a status of Booked are released.

Working with Subfunctions

Events planners and events managers may want to associate subfunctions with one or more of the functions in an event. A subfunction is an activity that is associated with a function, that takes place during a time that overlaps with the associated function, and that either uses the same room as the function, or does not require a reserved room.

For example, if an events planner is planning a function that is an all-morning seminar, with a coffee break in the back of the seminar room part-way through the morning, the coffee break can be planned as a subfunction of the seminar, rather than requiring the seminar to be split into two discontinuous functions separated by a coffee break function.

In a list of functions for an event, a subfunction is shown as indented under the function with which it is associated. As with standard Windows hierarchical lists, lists of event functions and subfunctions can be expanded to show all subfunctions or collapsed so that a plus symbol (+) appears to the left of any function that has undisplayed subfunctions.

Line items for a subfunction are handled in the same way as line items for a function.

The following procedure describes how to create a subfunction.

To add a subfunction to an event

1. Follow the instructions in "To add a function to an event" on page 79.
2. Select the function you want to change to a subfunction.
3. In the Functions list, click the move up or move down button to place the selected function directly under the function that will serve as parent to the subfunction.
4. In the Functions list, click the promote one level button to change the selected record to a subfunction of the function listed directly above.

   The subfunction is indented under the function, and a minus sign (-) appears to the left of the function.
5. If you prefer to hide the subfunction, click the minus sign (-) to the left of the parent function.

   The subfunction record disappears, and a plus sign (+) replaces the minus sign (-) next to the function.

Copying a Function or Subfunction

When an events planner adds functions to an event, efficiency can be increased by copying an existing function (or subfunction) and adapting the copy. The function that is copied can be from any event.

When a function and its subfunctions are copied together, the function/subfunction relationship is preserved. If the Details check box is selected, line items are also copied.

If a subfunction is copied separately from its parent function, the copy is treated as a function, in its new location, rather than as a subfunction.

The following procedure describes how to add a new function by copying an existing one.

To add a new function by copying an existing function

1. Navigate to the Functions screen and select the function you want to copy.
2. In the Function list, click Copy Function to display the Copy Function dialog box.
3. Complete the fields in the dialog box; some fields are described in the table that follows this procedure.
4. Click Copy to close the dialog box and display the new function in the Function list.

Field	Comments
# of Copies/Day	Number of copies of the selected function that will be created for each day of the specified event. Defaults to 1. Larger values are typically used for repetitive functions such as coffee breaks.
# of Days	Number of event days for which you want the selected function to be copied. Defaults to 1.
Details	When selected, copies line items of the current function and its subfunctions, as well as the other attributes of the function and its subfunctions. Requires an order number in the Order field.
End Time	Time at which the new function will end. Defaults to the value for the selected function.
Event	Event that will include the new function. Defaults to the value for the selected function.
Order	Order number that will include line items for the new function.
Room	Room where the new function will be held. Defaults to the value for the selected function.

Field	Comments
Start From	First date for which you want the selected function to be copied. Defaults to the value for the selected function.
Start Time	Time at which the new function will start. Defaults to the value for the selected function.

Creating Orders

Each event must be associated with one or more orders that specify goods and services to be provided for the event. An order can be associated with only one event.

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.
- **Event Order.** Informational only—does not serve as a basis for reports.
- **No BEO.** Indicates that the customer will not be invoiced for any line items on the selected order.
- **Rental Order.** Indicates that the line items on the order must be rented from an outside vendor. On a rental order, this vendor can be specified as the account for the order, rather than specifying the event customer as the account.

Each function within an event must be associated with a single order. Similarly, each line item must be associated with a single order. An order can be associated with multiple functions and/or line items.

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 will be located, that price list is the default price list for all the orders associated with the event.

The following procedure describes how to create an order.

To create an order

1. Navigate to the Events screen.
2. In the Events list, select the event for which you want to create an order
3. Click the Orders view tab to display the Event Orders list.

4 Click New to create a new record in the list, and then complete the fields; some fields are described in the following table.

Field	Comments
Account	Defaults to the value of the Account setting for the parent event. Can be changed to a vendor account for a rental order.
Address	Address for the account. This field is not displayed in the Orders list by default, but it can be shown by using the Columns Displayed command.
Approved	Indicates whether an events manager has approved the order, according to any procedures used by the organization.
Approved By	Person approving the order.
Currency	Specifies the currency to be used for pricing on line items. This field is not displayed in the Orders list by default, but it can be shown by using the Columns Displayed command.
Discount %	Discount percentage to be applied to all line items for the selected order. This field is not displayed in the Orders list by default, but it can be shown by using the Columns Displayed command.
Invoice #	Unique, read-only identifier for the invoice that is associated with the selected order. Automatically populated when a check is opened for the order.
Order Date	Automatically populated with the date and time the order record was created.
Order #	A unique, identifying number for the order. Automatically populated.
Price List	Determines which price list will be used to set prices for all line items for the selected order. Defaults to the price list associated with the event property (location). This field is not displayed in the Orders list by default, but it can be shown by using the Columns Displayed command.
Site	Location of the account associated with the order. This field is not displayed in the Orders list by default, but it can be shown by using the Columns Displayed command.

Field	Comments
Status	Indicates the status of the order. Available values are set in the FS_ORDER_STATUS LOV. Relevant values for eHospitality orders are Approved, Closed, Event Check, Open, and Projected. Additional values apply to other types of orders. A value of Event Check indicates that the check has been opened. A value of Closed indicates that the check has been posted. For more information about event checks, see Chapter 5, “Using Siebel eHospitality After Events.”
Type	The type of order you are creating. Values available by default include AVEO (Audio/Visual Order), BEO (Banquet Event Order), Event, No BEO, and Rental Order.

Specifying Order Details

After an events planner or events manager has created a basic order record for an event, additional details about the order can be specified.

The following procedure describes how to specify order details.

To specify order details

1. If you have not already done so, navigate to the Events screen, select the event for which you want to supply order details, click the Orders view tab, and then select the order for which you want to specify details.
2. Click the hyperlink in the Order # field to display the Orders screen.
3. Click the More Info view tab to display the Service Orders list and the More Info form.
4. In the More Info form, click the show more button to display additional fields.
5. Complete the fields.

   Be sure that a value is selected for the Price List field. Prices for order line items depend on the price list chosen.

Storing Order Notes

Siebel eHospitality can store notes that are associated with a particular order. There are two kinds of notes: external notes are displayed on Banquet Event Order reports (BEOs), guest invoices, and accounting invoices; internal notes are displayed on BEOs and accounting invoices.

The following procedure describes how to store a note regarding an order.

To store a note regarding an order

1. If you have not already done so, navigate to the Events screen, select the event for which you want to supply order details, click the Orders view tab, and then select the order for which you want to specify details.
2. Click the hyperlink in the Order # field to display the Orders screen.
3. Click the Notes view tab to display the Service Order form and the Notes list.

4 In the Notes list, choose either Internal or External from the drop-down list.

5 In the Notes list, click New, and then complete the fields; some fields are described in the following table.

Field	Comments
Created By	Automatically populated with the User ID of the person who creates the notes record.
Note	Allows you to enter notes of your choosing regarding the selected order.
Sequence #	Determines the order in which notes will appear in a BEO or invoice. Defaults to a value of 1.

Specifying Function Line Items

Function line items are used to specify the specific goods and services needed for each function in an event. A line item is specified by choosing a product from a list of products previously defined by an administrator. When a product is chosen, its existing characteristics include its subcategory, the charge codes associated with that subcategory, and the taxes and service charges associated with each charge code. The charge code that applies depends on the Business Type setting of the parent event. The taxes that apply may depend on the location (property) where the event is held and the service charges associated with the charge code. For the user, the effect of all these predefined characteristics and relationships is that charge codes, service charges, and taxes are automatically assigned when a product is chosen as a function line item. For more information about charge codes, service charges, and taxes, see "Defining Charge Codes, Taxes, and Service Charges" on page 56.

The following procedure describes how to add line items to a function.

To add line items for a function

1. Navigate to the Events screen and then select the event for which you want to add line items.
2. Click the Functions view tab to display the Events form and the functions list.
3. Click the Function Type hyperlink for the function for which you want to add line items.

4 In the Line Items list, click New, and then complete the fields; some fields are described in the table that follows this procedure.

Repeat this step to specify additional line items for the selected function.

NOTE: If a line item is a complex product with Type set to Package, the allocated price of the package must equal the sum of the allocated prices of the line items that make up the package. To check whether this is the case, select the package and click Recalculate. If the prices do not match, you must adjust the prices of the individual line items in the package, then click Recalculate again.

Field	Comments
Adjusted Price	Displays line item price after all applicable discounts have been applied. There may be discounts at the order, function, and line item levels.
Allocated Price	Price quoted to the customer. Defaults to the value of the Adjusted Price field, but can be changed. For a package, the sum of the allocated prices for the items in the package must be made to equal the allocated price for the package.
Item	Item name, chosen from a list of products.
Qty	Quantity needed of the line item.
Prod #	Product number of the line item. Available values are set in the Product Administration screen. This field is not shown by default, but can be shown using the Columns Displayed command.
Sequence	A read-only field automatically populated with information concerning function and subfunction relationships. This field is not shown by default, but can be shown using the Columns Displayed command.
Service Start	The time at which operations starts setting up the item or service. Overrides setup time for product associated with line item, if earlier than the time the function starts minus the product setup time.

Field	Comments
Status	Indicates whether a specific asset or assets have been reserved or “booked.” Products with Resource Type of Critical receive an automatic attempt to reserve an appropriate asset. Products with Resource Type of General are not associated with assets and are not reserved. Products with Resource Type of Non-Critical must be reserved through the use of the AutoBook button. For more information about reserving assets, see “Reserving Assets” on page 98.
Unit Price	Automatically populated based on the price list for the order that includes the selected function. If they are available in the price list, uses Promotional Prices for list items, otherwise uses List Prices.
UoM	Units for the line item. Automatically populated based on the UoM value for the associated product, which is set in the Product Administration screen.

Adjusting Line Items Prices and Other Details

If an events planner or an events manager wants to apply discounts or waive charges for any individual line item, this can be done using the Line Items Detail form. The following procedure describes how to specify line items details.

To specify line items details

1. Navigate to the Functions screen.
2. Click the Line Items view tab.
3. Select the line item for which you want to specify additional details.
4. Scroll down until the subview tabs are visible, and then click Line Item Detail.

5 Complete the fields in the Line Item Detail form; some fields are described in the following table.

Field	Comments
Category Type	General group to which the product associated with the selected line item belongs. Automatically populated from the specifications for the product.
Complimentary	When selected, prevents any charge for the selected line item by setting the item’s Allocated 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 Allocated Price to zero for each subsidiary line item.
Description	Automatically populated from the specifications for the product associated with the line item.
Discount %	Percentage discount to apply to the list price for the selected line item. Can be used concurrently with Discount Amt. If both are used, Discount Amt is subtracted before Discount % is applied.
Discount Amt	Currency amount to subtract from the list price for the line item, on a per unit basis. Can be used concurrently with Discount %. If both are used, Discount Amt is subtracted before Discount % is applied.
Display Name	Line item name that will appear on BEO, SOE, and invoice reports. Defaults to the value of Item in the Line Items list.
Note	Optional text about the line item to display on BEO and SOE reports.
Show in Print	When selected, causes line item information to be included in Schedule of Events (SOE) report.
Sub Category Type	Specific group to which the product associated with the selected line item belongs. Automatically populated from the specifications for the product.
Svc Chg Inclusive	When selected, indicates that the list price for the line item includes a service charge.

Field	Comments
Tax Inclusive	When selected, indicates that the list price for the line item includes any applicable taxes.
Waived	When selected, prevents any charge for the selected line item by setting the item's Allocated Price to zero. When selected for a line item that is a complex product, also automatically sets the Allocated Price to zero for each subsidiary line item. Automatically selected when the Complimentary check box is selected. Typically used without selecting Complimentary when the regular charge for the item has been dropped as a result of negotiations with the customer.

Reserving Assets

In Siebel eHospitality, an asset is a specific physical item that is kept at a specific property (location). Assets are used to fulfill some line item requirements, but not all. When an events planner or events manager specifies line items for functions or orders, typically there will be a mixture of Critical, Non-Critical, and General values for the Resource Type settings of the products associated with the line items.

- General resources are not associated with individual assets, and ordinarily consist of perishables and common items such as food, beverages, chairs, tables, and linens.
- Non-Critical resources are associated with individual assets of modest monetary value and relatively ready availability, such as overhead projectors.
- Critical resources are associated with individual assets of high monetary value and relative rarity, such as grand pianos or teleconferencing equipment.

Events planners and managers can reserve (or “book”) individual assets for both Non-Critical and Critical resources, but not General resources, as part of the process of specifying line items for a function or order. In the following situations, eHospitality automatically attempts to reserve Critical assets:

- When a line item is created that specifies a Critical asset
- When a line item for a Critical asset is copied
- When the Service Start time is changed for a Critical item
- When the Quantity is changed for a Critical item

Non-Critical assets are normally reserved using the Autobook button, which compares available assets at the function location with function line items and timing requirements.

If a line item specifies a quantity that is available at the specified time and place, it can be reserved. The Autobook button reserves the first available listed assets that meet the specifications.

If a line item specifies a quantity that is larger than the quantity available, no partial reservation is made. Instead, the Status field for the line item displays an informative message, such as “Not Enough Assets.”

If a line item specifies an asset that is booked for another function at the indicated time, the Status field displays a message such as “Not Available.”

Double-Booking Assets

In a case where a specific asset is present at the specified property but is requested by more than one function, the first request successfully reserves the asset. Any additional request for the asset will fail, but the requestor has the option of *double-booking* the asset, which stores the request for the asset and the time requirements, in case the original reservation is cancelled. Such a request does *not* automatically result in a reservation for the second requestor, if the first request is cancelled. It simply provides information about who might wish to reserve the asset, if it becomes available.

Double-booked assets display two-tone color bars in the Availability display for function line items. This display is a Gantt chart that shows the times for which individual assets are reserved or double-booked, and the identities of the parties 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 discuss whether the double-booked asset can be shared between the conflicting functions.

The following procedure describes how to reserve appropriate assets for the line items that refer to Non-Critical and Critical resources.

NOTE: It is best to use this procedure after most function line items have been specified, as described in “To add line items for a function” on page 93.

To reserve assets to fulfill function line item requirements

1. If you have not already done so, navigate to the Functions screen, and select the Function for which specific assets need to be reserved.
2. Click the Line Items view tab.
3. Click Autobook to automatically assign appropriate available assets to the line items of the function.

4 Inspect the Status field value for each function line item, to determine which line items were successfully booked, and which need additional action.

If all line items were successfully booked, this step concludes the procedure. The following steps describe how to proceed for any item that was not successfully booked.

5 To view information about assets located at the specified property, scroll down until you can view the Line Items Detail subview form, and then click the Assets subview tab.

6 If an asset that you need is listed in adequate quantity, but was not booked, select the asset in the Assets list and click Double Book.

This registers your backup request for the asset, in case the other reservation is cancelled.

7 If you want to negotiate for the use of the asset with the party who successfully reserved it, make a note of the asset number, and then click the Availability subview tab to display a Gantt chart that records asset reservations.

8 Locate the asset that interests you by finding its asset number, then click the previous record set button or next record set button until the highlighted time period of the existing reservation appears.

9 Position your cursor over the highlighted area to display the existing reservation's Event Name, Event Manager, and starting and ending date and times, including setup and tear-down time.

Canceling a Function

If plans change, and an event no longer will include a particular function, an events planner or events manager can cancel the function. This 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 is not automatically converted to a regular booking. The record for a cancelled function also remains in the system, along with its line items, but the function is not listed on a Schedule of Events (SOE), and its line items are not displayed on any invoice.

The following procedure describes how to cancel a function.

To cancel a function

1. Navigate to the Functions screen and select the function you want to cancel.
2. Click the More Info view tab.
3. Click the Cancel Function button or set the Status setting to Cancelled.

Generating Banquet Event Order Reports

Events planners and events managers may find it useful to generate and print a Banquet Event Order (BEO) report before a given function occurs. A BEO report contains detailed information about food, beverages, and setup requirements for all functions covered by a single order.

To generate one or more BEO reports

1. Navigate to the eHospitality home page.
2. Click the title of the All Orders list.
3. Query for the order or orders that need BEO reports generated.

   The following steps generate a BEO report for each order record in the current query set. If multiple orders are listed, multiple BEO reports are generated.

4. Make sure one of the following view tabs is selected:
   - More Info
   - Functions
   - Line Items
   - Notes
5. From the application-level menu, choose View > Reports to display a dialog box where you can specify a report to generate.
6. In the Select a Report drop-down menu, click Banquet Event Order.
7. Click Run Now to display the report in a Siebel Report Viewer window.
8. Click the Print Setup button to display a standard Windows print dialog.
9. Choose appropriate printer settings, and then click OK.

Generating Schedule of Events Reports

Events planners and events managers may find it useful to generate and print a Schedule of Events (SOE) report, before a given event occurs. An SOE report contains a list of the functions that make up an event. It includes starting and ending times, assigned rooms, and projected attendance information. It generally does not contain details regarding food and beverage requirements, but references BEOs that contain that information. An SOE report may cover several days.

To generate an SOE report

1. Navigate to the Events screen.
2. Query for the event or events that need SOE reports generated.

   The following steps generate an SOE report for each event record in the current query set. If multiple events are listed, multiple SOE reports are generated.
3. Make sure one of the following view tabs is selected.
   - More Info
   - Functions
   - Orders
4. From the application-level menu, choose View > Reports to display a dialog box where you can specify a report to generate.
5. In the Select a Report drop-down menu, click Schedule of Events.

   Click Run Now to display the report in a Siebel Report Viewer window.
6. In the Siebel Report Viewer window, click the Print Setup button to display a standard Windows print dialog.
7. Choose appropriate printer settings, and then click OK.

Using Siebel eHospitality After Events 5

This chapter describes the procedures that events operations personnel would use to conduct a current event and to follow up after the event, using uncustomized Siebel eHospitality software. Where the procedures are unique to Siebel eHospitality, this chapter describes them in detail. Where the procedures match the functionality of standard Siebel eApplications, this chapter provides cross-references to other manuals.

An applications developer can use the information in this chapter and in Chapter 4, “Using Siebel eHospitality Before Events,” as a starting point for customizing end-user screens and views in Siebel eHospitality.

In ordinary circumstances, the procedures in Chapter 3, “Setting Up Siebel eHospitality,” must be completed before the procedures in this chapter can be used.

For a scenario that describes the business use of the procedures in this chapter, see “Business Scenario” on page 17.

Understanding Orders, Checks, and Invoices

This section discusses the interrelated concepts of orders, checks, and invoices. It is important to understand these concepts before working with the procedures that follow.

Understanding Orders

In Siebel eHospitality, each event may be associated with one or more orders for goods and services. Each order may be associated with one or more functions within the event. For example, a single order for food and beverages might be used for both breakfast and lunch for a one-day event.

The specific goods and services listed on an order consist of the line items for the functions associated with that order. If the Type value for the order is BEO, each day of a multi-day event must have its own order or orders. Other order types can apply to multiple days of an event.

The following diagram, Figure 7, shows the relationship between events, orders, functions, and line items. Note that each line item is associated with both a function and the order for that function.

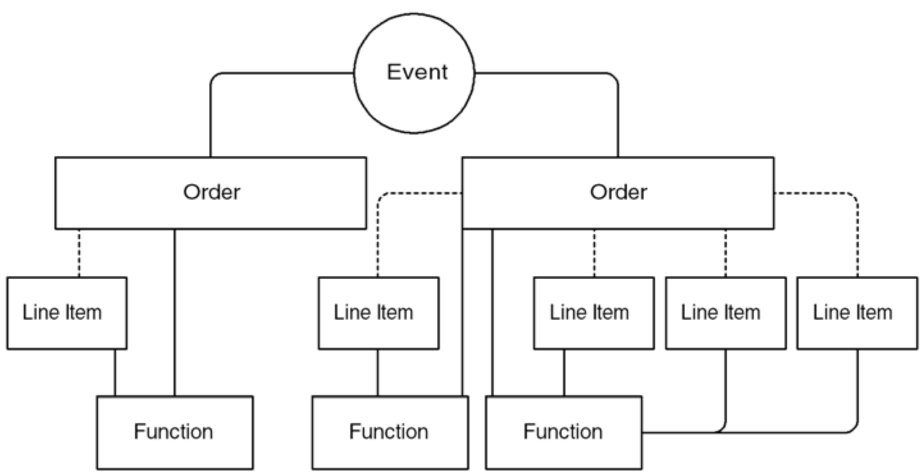


Figure 7. Relationship Between Events, Orders, Functions, and Line Items

Understanding Checks

An *event check* is a collection of information about all the goods and services provided as part of an individual order, including quantities and prices, so each event check corresponds to one specific order. Users work with data for event checks in the Function view of the Orders screen.

Working with Checks During Events

Ordinarily, event operations staff members *open* an event check early on the day when the associated order's goods and services will be provided. The process of opening an event check adds an invoice number to the order record and changes the value of the order's Status field to "Event Check," It also creates a new invoice record with a status of "Open," although this is not automatically displayed. Some fields in the new invoice record are automatically populated at this time.

An event check can be opened individually, for a selected order, or event checks can be opened simultaneously for all orders to be filled on a given day. If event checks are opened for all of a day's orders at once, the process is called *opening a day*, rather than opening an event check.

Once an event check has been opened, whether individually or as part of a day, events operations staff can make any necessary changes to the associated order and function line items, so that the line items reflect the exact items and quantities actually supplied, rather than items and quantities ordered beforehand.

Creating Trial Checks

When all of an order's line items reflect the goods and services actually supplied, event operations staff or events managers have the option of performing a trial calculation of charges before producing a final invoice. This process is called creating a *trial check*. If errors or omissions are found in the trial check, they can be corrected by modifying the data in the Functions view of the Orders screen. When a trial check is produced, the status of the associated invoice is automatically set to Trial.

Trial checks can also be created in earlier stages of the event-planning process, to provide the customer with an estimate of the charges incurred so far.

Posting Checks

When events personnel are confident that all the information for a given order is correct and final, the next task to be performed is *posting the check*. This process performs final calculations, sets the order status to Closed, and sets the invoice status to Posted. From the invoice record thus updated, events personnel can generate a printed invoice using Siebel Reports. Each order results in its own invoice.

NOTE: The Invoice screen provides read-only access to data. If events personnel need to correct something that appears on an invoice, the correction must be made in the line items for orders or functions. It is recommended that checks be posted only after verifying that all line items and quantities are correct.

If an organization prefers to post checks for all of a day's orders at once, events personnel can *post the day,* rather than posting the individual checks separately.

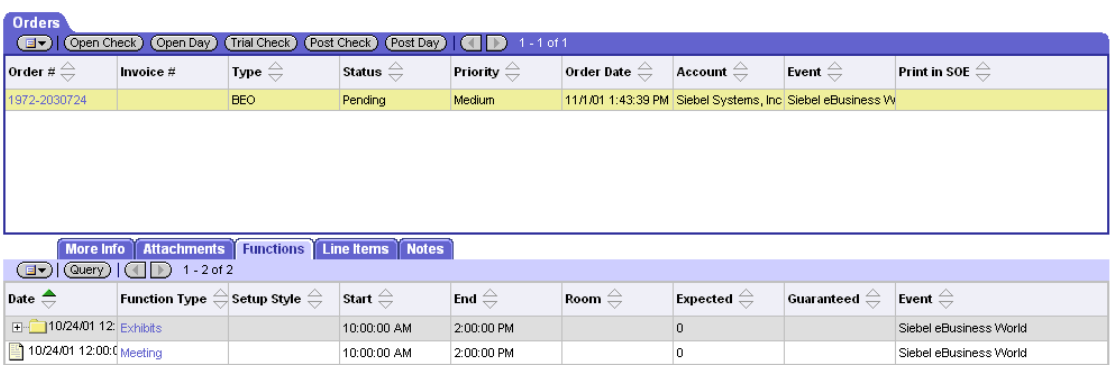
Opening Event Checks

When an events manager is ready to begin updating an order's line items and quantities to reflect what is or was actually supplied, the order's event check must be opened. Each order's event check can be opened individually, or event checks for a whole day's orders can be opened simultaneously. The following procedure describes how to open a selected event check or a whole day's event checks.

To open an event check or day

1. Navigate to the Events screen.
2. Select the event for which you want to open an event check.
3. Click the Orders view tab to display the orders associated with the selected event.
4. Click the Order # hyperlink for the order for which you want to open an event check.

   An Orders list and Functions list appear.



5. In the Orders list, perform one of the following actions:
   - **To open an event check for the selected order,** click Open Check.
   - **To open event checks for all the day's orders,** click Open Day, specify a date, and then click Open Checks.

Processing Event Checks

When an event check has been opened, either individually or as one of a day's event checks, events personnel can modify order and function line items to reflect the goods and services actually supplied.

Once an order's line items reflect what was supplied, events personnel can create a trial check to verify that appropriate calculations and data will be used to generate the final invoice for the order.

NOTE: It is possible to modify all of an order's line items by editing records in the Line Items view of the Orders tab. If the order is associated with multiple functions, events personnel may prefer to modify line items on a function-by-function basis. In this case, one would navigate to the Line Items view of the Functions tab, select each of the order's functions, and edit the line items associated with that function.

Modifying Line Items

The following procedure describes how to modify order line items.

To modify line items to reflect actual goods and services supplied

1. Navigate to the Events screen.
2. Select the event for which want to modify line items.
3. Click the Orders view tab to display the orders associated with the selected event.
4. Click the Order # hyperlink for the order for which you want to modify line items.

   An Orders list and Functions list appear.
5. Click the Line Items view tab to display a list of all line items associated with the selected order.

6 Modify each line item, as needed, to reflect the actual goods and services you supply.

NOTE: The header of the Line Items list contains several buttons that are not normally used for eHospitality business tasks. These buttons include Fulfill All, Customize, and Reprice All.

Creating Trial Checks

The following procedure describes how to calculate charges for goods and services supplied by creating an Invoice with a status of Trial, called a *trial check*. The trial check can be used to review charges for completeness and accuracy before actually invoicing the event customer.

To create a trial check

1. Navigate to the Events screen.
2. Select the event for which you want to create a trial check.
3. Click the Orders view tab to display the orders associated with the selected event.
4. Click the Order # hyperlink for the order for which you want to create a trial check.

   An Orders list and Functions list appear.
5. In the Orders list, click Trial Check to display an Event Invoice form and a Line Items (Guest) list.
6. Click one of the following view tabs, to indicate the trial invoice type you want to generate:
   - **Line Items (Guest) view tab.** Used to create a trial invoice of the type that eventually will be sent to the event customer.
   - **Line Items (Accounting) view tab.** Used to create a trial invoice for use within your organization.
7. From the View menu, select Reports to display the Event Invoice dialog box.

8. In the Select a Report drop-down menu, select Invoice - Guest or Invoice - Accounting, depending on your choice in Step 6 on page 111.
9. Click Run Now.

   The trial check is displayed in a separate Siebel Reports Viewer window.

If inaccuracies are found in the trial check, the instructions in "To modify line items to reflect actual goods and services supplied" on page 110 describe how to correct any faulty data.

Generating Invoices

When events personnel have successfully created a trial check that reflects all appropriate charges for the selected order, the next step is to post the check and generate a final invoice to send to the customer. The following procedure describes how to post a check and create an invoice.

To post a check and generate an invoice

1. Navigate to the Events screen.
2. Select the event for which you want to post a check.
3. Click the Orders view tab to display the orders associated with the selected event.
4. Click the Order # hyperlink for the order for which you want to post a check.

   An Orders list and Functions list appear.
5. In the Orders list, click Post Check to display an Event Invoice form and a Line Items (Guest) list.
6. Click one of the following view tabs, to indicate the invoice type you want to generate:
   - **Line Items (Guest) view tab.** Used to create an invoice to be sent to the event customer.
   - **Line Items (Accounting) view tab.** Used to create an invoice for use within your organization.
7. From the View menu, select Reports to display the Event Invoice dialog box.
8. In the Select a Report drop-down menu, select Invoice - Guest or Invoice - Accounting, depending on your choice in Step 6 on page 113.
9. Click Run Now.

   The invoice is displayed in a separate Siebel Reports Viewer window.
10. If you want to print the invoice, click the Print Setup button in the Siebel Report Viewer window to display a standard Windows print dialog, choose appropriate printer settings, then click OK.

The following procedure describes how to view information about all invoices for a multiple-invoice event.

To view invoice information for all events in a multiple-invoice event

1. Navigate to the Events screen.
2. Select the event for which you want to view invoice information.
3. Click the Event Invoices view tab.

Voiding Invoices

From time to time, someone may find an error in an invoice, or a customer may complain about a particular charge and receive promises of adjustment. If this should occur, events personnel must void the existing invoice, correct any inaccuracies in the order data, make any promised adjustments in charges, re-post the check, and generate a new invoice.

The following procedure describes how to void an invoice.

To void an invoice

1. Navigate to the Events screen.
2. Select the Event for which you want to void an invoice.
3. Click the Orders view tab.
4. Click the Order # for the order associated with the invoice you want to void.
5. In the Orders list, click the Invoice # hyperlink for the invoice you want to void.

   An Event Invoice list appears.

6. In the Status field, select Voided, then step off the record.

   A new invoice record is created automatically, with a new invoice number. The status of the new invoice is Open. The order number for the new invoice is the same as the order number of the voided invoice. The status of this order is automatically changed to Event Check. This new value for the order status is not visible in the current screen, but can be viewed by navigating to the Orders screen.

Index