

Oracle® Hospitality Suite8
Customer Relationship User Manual
Release 8.9

July 2015

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Preface

Audience

This user manual is intended for system users and system administrators.

Customer Support

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

<https://support.oracle.com/>

When contacting Customer Support, please provide the following:

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

Documentation

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

<http://docs.oracle.com>

Revision History

Date	Description of Change
July, 2005	<ul style="list-style-type: none">• 8.5.0.0 - First Issue Small Business Edition
May, 2008	<ul style="list-style-type: none">• 8.7 - Updated for Version 8.7
June, 2008	<ul style="list-style-type: none">• 8.7.3.1 - Updated for Version 8.7.3.1
May, 2009	<ul style="list-style-type: none">• 8.8 - Updates for Version 8.8
Sept, 2010	<ul style="list-style-type: none">• 8.8 - Updates for Oracle 11gR1
Jan, 2012	<ul style="list-style-type: none">• 8.9 - Updated for Version 8.9
Nov, 2012	<ul style="list-style-type: none">• 8.9 - New cover page
July, 2015	<ul style="list-style-type: none">• 8.9 - Oracle template applied

1 Introduction

About Suite8 Customer Relationship Management

The Suite8 Customer Relationship Management Module (CRM) allows you to perform all the hotel customer relationship management functions. Throughout this manual we will refer to Customer Relationship Management as CRM.

The Customer Relationship Management module provides a global view of your guests' preferences and needs. Detailed guest profiles with information about special requests and preferences are always available, making perfect and personalised service easier.

A profile is a record of information about an individual guest, company, agent, source, vendor, meeting planner or booker. Profiles are comprised of basic information: such as the guest/company/agent name, addresses, communications, language, as well as marketing information, links to other profiles, notes and statistical information about future and previous hotel stays and conference bookings.

For the Sales Force it is important that all activities - who, when, where, what was discussed, follow up - are logged. Suite8 is capable of tracking any kind of activity. These activities may be used internally or linked to the appropriate customer profile so as to be included on sales activity reports.

With the Calendar option, Suite8 can keep track of future activities, critical dates and calendar periods, such as Christmas.

Fidelio Suite8 offers two types of mailings, the standard mailing allows users to enter values in a number of pre-defined fields and the advanced mailing enables users to build queries based on pre-defined views, fields and values, with the possibility to create additional views at any time.

Logging In

To use Suite8 you must first log into the system. You must have a valid user identification and password.

Logging into Suite8

1. From the desktop, click the Fidelio Suite8 icon.



The Suite8 Splash screen is displayed for several seconds with the Payment Application Data Security Standard (PA-DSS) disclaimer

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Hotel Management Solutions

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Version 8.9.0.0

suite
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This application is intended to be used to establish a connection between a certain MICROS Systems, Inc. (MICROS) product and certain third party products not developed by or controlled by MICROS (Non-MICROS Products). These Non-MICROS Products may or may not be compliant with the Payment Card Industry Payment Application Data Security Standard (PA-DSS). MICROS strongly recommends that all merchants who are connecting any MICROS payment processing products to any Non-MICROS Products ensure that both the MICROS and Non-MICROS products are PA-DSS compliant.

The Fidelio V8 Login screen is then displayed.



2. Type your user identification (case sensitive) in the Login name box.
3. **Tab** to the Password box.
4. Type your secret password (case sensitive) in the Password box.
5. Click LOGIN, the Suite8 main menu screen appears.

You are now logged into the system.

Note: If one of the following tables: WMLG, WLOG, ZPOS, WDAT, SHIS, SRPD, WRPD has no indices or a missing index, an alert is displayed when starting Suite8 with a message to contact support. It could happen that a table has no indices in the event that a table was renamed for support purpose. Renaming a table carries the indices to the renamed table. If an index is missing of one of the above mentioned tables, the alert is displayed when starting Suite8.

CRM Shortcut Bar

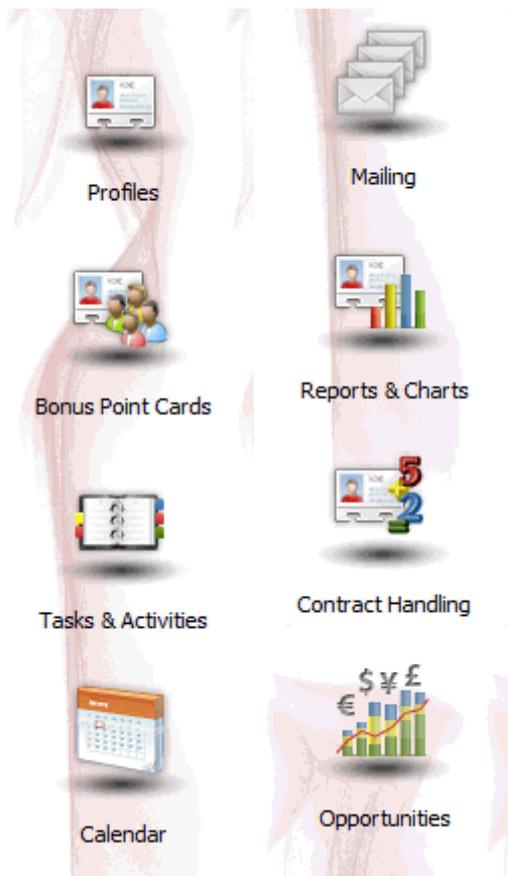
The Suite8 main menu screen has nine coloured tabs located on the left of the screen. Each coloured tab represents one of the main user modules.

Reservation
Customer Relation
Front Desk
Meeting Planner
Cashiering
Rooms Man.
Misc.
Favourites
Web Services

To open the CRM Shortcut Bar:

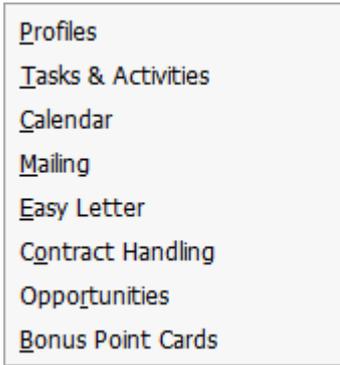
1. Click CUSTOMER RELATION from the coloured toolbar.

The Customer Relationship shortcut bar opens.



2. Alternatively you can click CUSTOMER RELATION on the menu bar.

The Customer Relation menu screen appears.



Navigation Keys

Accelerator keys

Accelerator keys are used for fast access to a box on a screen or dialog box. When a letter is underlined you can press the **Alt + letter** keys and the cursor moves into the appropriate box. For example, on the Profile Search screen the letter “A” is underlined in the Name box. By pressing the **Alt + A** keys, the cursor moves into the Name box.

To use the accelerator keys:

From the screen or dialog box, press **Alt + letter** to move the cursor into the appropriate box.

Shortcut keys

Suite8 has shortcut keys that allow you to perform actions directly from the keyboard without having to use the mouse. Using these keys saves you time.

Suite8 Shortcut keys

Shortcut Key	Description
F1	Displays the help.
Alt + F4	Closes the active window.
F10	Closes all active windows.
F12	Moves the cursor from a data box to the first record on the grid.
Alt + Down arrow	Displays a combo box.
Tab	Moves forward through the boxes/options. Moves to the next box and confirms the entry.
Shift + Tab	Moves backward through the boxes/options.
Ctrl + Tab	Moves forward through tabs.
Ctrl + Shift + Tab	Moves backward through tabs.
Escape	Cancels the current action. Removes a Combo box before a selection has been made.
Home	Moves the cursor to the beginning of a box.
End	Moves the cursor to the end of a box.

Accelerator keys

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example, on the Profile Search screen the letter “A” is underlined in the Name box. By pressing the **Alt + A** keys, the cursor moves into the Name box.

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Suite8 Shortcut keys

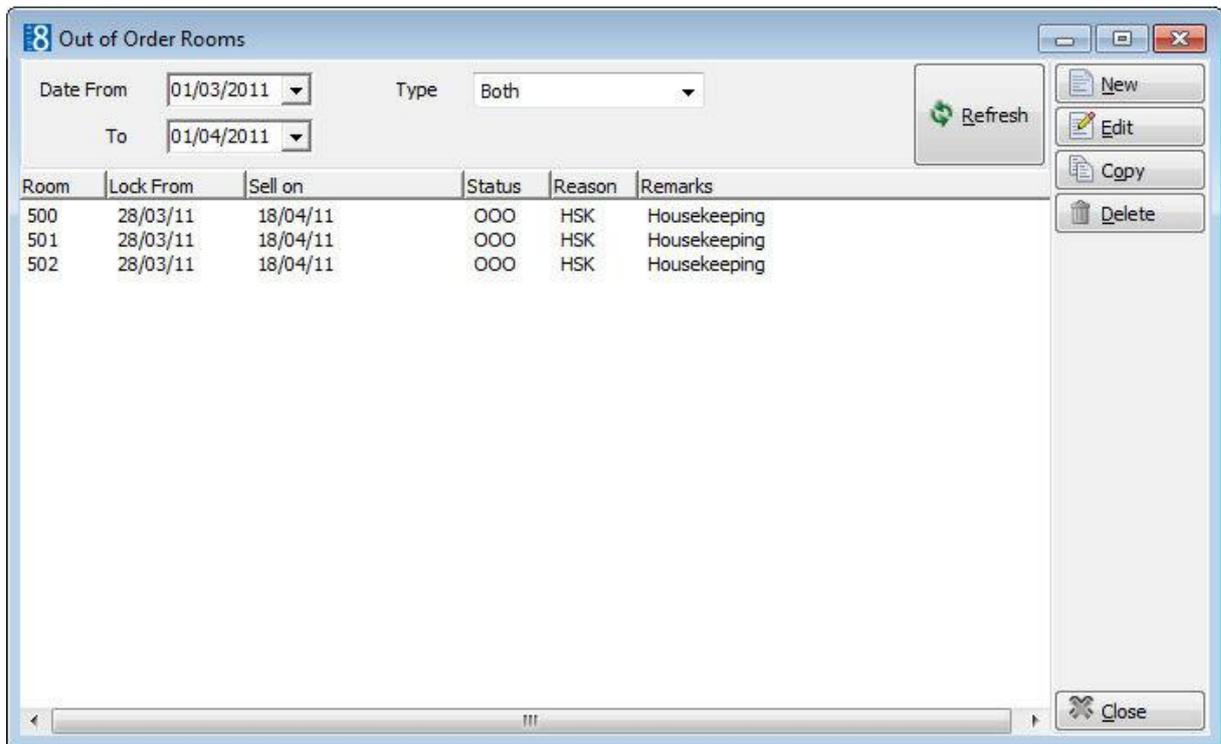
Shortcut Key	Description
F1	Displays the help.
Alt + F4	Closes the active window.
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Tab	Moves forward through the boxes/options. Moves to the next box and confirms the entry.
Shift + Tab	Moves backward through the boxes/options.
Ctrl + Tab	Moves forward through tabs.
Ctrl + Shift + Tab	Moves backward through tabs.
Escape	Cancel the current action. Removes a Combo box before a selection has been made.
Home	Moves the cursor to the beginning of a box.
End	Moves the cursor to the end of a box.

Using the blue drill down arrow

Many boxes have a blue drill down arrow  next them indicating that there is additional information that can be displayed.

Housekeeping				
	Total	Occupied	Vacant	
Clean Rooms	57	1	56	
Dirty Rooms	80	17	63	
Total		18	119	
Out of Order	0	0	0	
Out of Service	0	0	0	
Rooms in Queue			0	

For example, on the House Status screen clicking the blue drill down arrow on the Out of Order line displays the Out of Order Rooms screen.

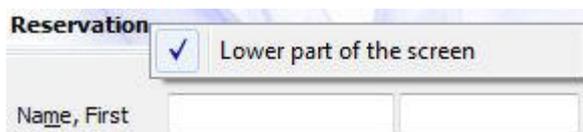


HTML View

Suite8 offers the possibility to view information in HTML format. HTML is the abbreviation for "Hypertext Markup Language." This is the system of marking a document so it can be published on the World Wide Web and viewed with a browser. The main areas where information can be viewed in HTML format are as follows:

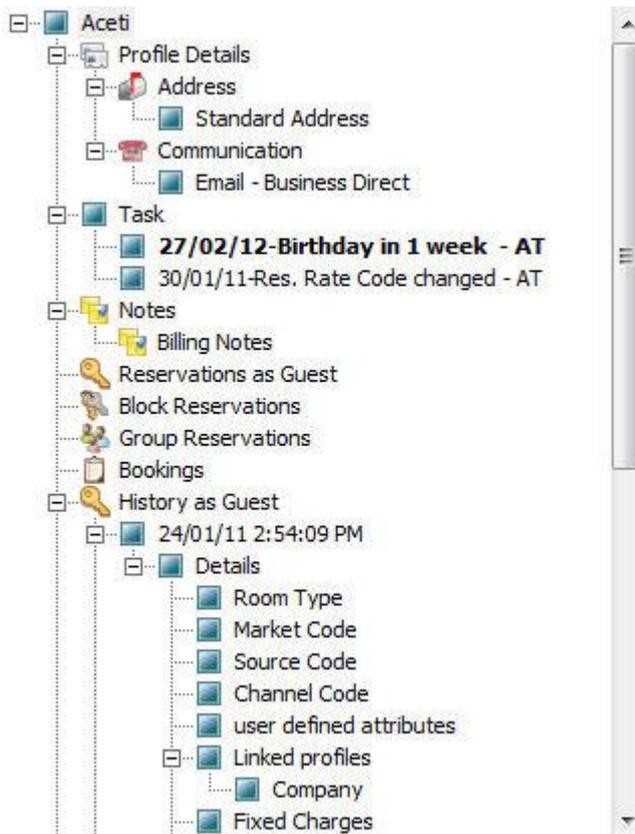
- Reservation Navigator
- Blocks
- Profiles
- Cashiering
- Tasks and Activities
- Events
- Conference Reservation

The HTML display on the reservation navigator can be hidden so that the reservation grid is expanded. Double-click in the **blue reservation header bar** or right-click and select/deselect LOWER PART OF THE SCREEN from the short-cut menu to view or hide the HTML display. This setting is stored per user and remains until the next time it is changed.



Expand the HTML tree

- Click the expand icon  to show all available folders.



Collapse the HTML tree

- Click the collapse icon  to collapse all folders to the uppermost level.



Refresh the HTML View

- Click the refresh icon 

View information in HTML format

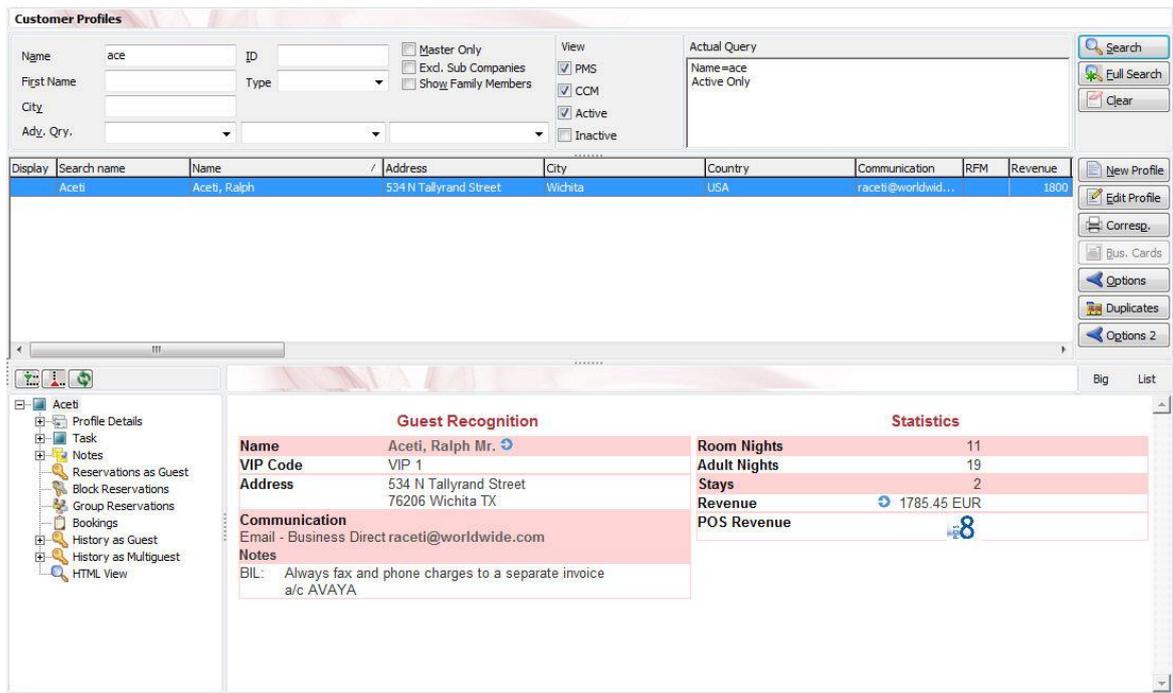
In this example we will display information in HTML format on the profile screen.

- Click the CUSTOMER RELATION menu and select PROFILES to display the customer profile screen.

This main customer profile screen is called the Navigator and is divided into 3 distinct areas:

- Query - basic and advance profile search criteria
- Query Results - the results of the query shown in a grid format
- Tree Listing and HTML Page
 - A tree listing of all the details associated with this profile including address, communications, links, reservations or history
 - A freely definable HTML display which by default has a 'big' format where the details are displayed in a non-grid style format or a list format. The HTML display can be printed by using the right mouse click.

2. Enter the name to search for in the NAME box and click SEARCH.



4. The query results are shown in grid format in the middle section of the screen and the tree and HTML formats are shown in the lower section of the screen.



5. In this instance the HTML view displays a summary of the profile details. The tree listing is displayed by default expanded by one level. A plus sign next to a folder indicates that it can be expanded to show more folders; a minus sign indicates that it can be collapsed.

Change the display of the HTML

Two additional buttons on the html display allow you to change whether certain details are displayed in a non-grid style or in a list format. By default the 'big' view is displayed.

1. To view in list format click the  button.

Arrival	Departure	Nights	Customer	Arrival day	Departure day	No of Rooms	Room type	Room	Market	Rate Code
20/04/11	22/04/11	2	Aceti Ralph	20/04/11	22/04/11	1	Double Room		Individual	
30/03/11	31/03/11	1	Aceti Ralph	30/03/11	31/03/11	1	Double Room	109 Double Room	Individual	

2. To view in a non-grid style, click the  button.

20/04/11	30/03/11
Departure: 22/04/11	Departure: 31/03/11
Nights: 2	Nights: 1
Customer: Aceti Ralph	Customer: Aceti Ralph
Arrival day: 20/04/11	Arrival day: 30/03/11
Departure day: 22/04/11	Departure day: 31/03/11
No of Rooms: 1	No of Rooms: 1
Room type: Double Room	Room type: Double Room
Room:	Room: 109 Double Room
Market: Individual	Market: Individual
Rate Code:	Rate Code:

Copy to clipboard

It is possible to copy information from the HTML files to clipboard by selecting items from HTML, using right mouse short cut menu and selecting COPY TO CLIPBOARD or short cut key CTRL + C. This information can then be pasted to any open file by using right mouse menu option PASTE or short cut key CTRL + V.

 The menu option COPY TO CLIPBOARD is controlled by the user right COPY TO CLIPBOARD FROM HTML under Users → User Definition → Rights → Miscellaneous

The Quick Keys

Suite8 allows you to select the Quick Keys main menu from any screen. The quick keys are shortcuts to screens, searches, and desktop tools. Using these keys allows rapid access to information without having to leave the section that you are currently working on. For example, a customer is making a new reservation while at the same time asking questions about restaurants in the area. You can use the Telephone Book quick key for restaurant information instead of aborting the new reservation screen, looking up the restaurant information, closing the Telephone Book, and reopening the new reservation screen.

To access the Quick Keys main menu

- Click the QUICK KEYS menu option.
The Quick Keys menu is displayed.

Arrivals	Ctrl+A
Availability	Ctrl+D
Billing	Ctrl+B
Calendar	F4
Conference Diary	F3
Conference Floor Plan	Shift+Alt+F3
Currency Calculator	Shift+Alt+R
Event Vacancies	Ctrl+Shift+F3
Event Waitlist Priority	Ctrl+W
Floor Plan	Ctrl+F
Goals	Ctrl+Shift+G
Group Reservation	Ctrl+G
Hotel Segment Statistics	Ctrl+Shift+S
House Status	Ctrl+H
Inhouse Guests	Ctrl+I
Interface Functions	Shift+F8
Logbook	Shift+Alt+L
Maximum Availability	Ctrl+Shift+M
Messages	Ctrl+M
New Reservation	Ctrl+N
Postings	Ctrl+E
Profiles	Ctrl+P
Quick Reservation	Ctrl+Q
Rate Query	Ctrl+R
Reports	Ctrl+Shift+R
Room Rack	Ctrl+L
Room Search	Ctrl+S
Room Type Availability	Ctrl+Shift+D
Space Occupancy	Ctrl+F3
Table Reservation	Ctrl+Shift+A
Telephone Book	Ctrl+T
Update Reservation	Ctrl+U

The Date Box

The format of the dates and the separators between the dates may vary from one hotel to another. The date format is defined in the Control Panel Windows Regional Settings/Options.

Typical date formats include the following:

- dd/yy
- MM/dd/yyyy
- yy/MM/dd
- yyyy-MM-dd
- dd-MMM-YY

You can type the date directly in the date box; however it must be typed exactly as per the pre-defined format.

There are many date boxes in the system, for example, Arrival Date or From Date. The date can be either a specific date or an as of date.

Arrival date From:

A specific date is when you need to see what happened on that day. For example, you need to see which guests have departed 01/01/03.

An 'as of date' is when you need to find out information starting from that date. For example, you need to read the room rack starting from 09/09/03 through 12/09/03.

Changing the date

The date can be changed by typing a new date or with the use of the calendar.

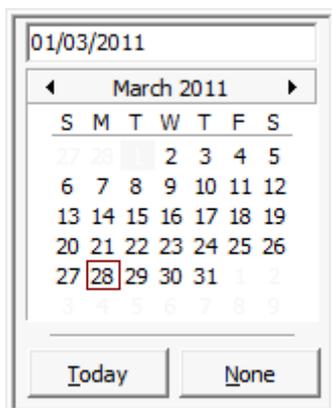
To type a new date

1. Place the cursor in the Date box.
2. Type the new date in the Date box, in the defined format including separators.
3. Press the **Tab** key, the date is changed.

To change a date using the calendar

1. Click the drop down arrow next to the Date box.

The calendar appears.



2. Change the month to a previous month or future month by clicking the horizontal arrows located on the top of the calendar or by pressing the **Ctrl + Page Up** or **Ctrl + Page Down** key.
3. Place the cursor on the date and click the left mouse button **or** move the keyboard arrow keys to locate the date and press **Enter**, the date is changed.

Customising Suite8 Grids

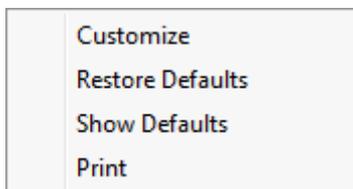
Many of the grids in Suite8 may be customised according to the needs of the property. The customization options available are:

- CUSTOMIZE - opens the customize dialog box so that columns on the grid can be added, changed or removed.
- RESTORE DEFAULTS - applies the default settings for this grid.
- SHOW DEFAULTS - applies the default settings to the current grid view, however, any customised settings are used the next time the grid is displayed.
- Select PRINT to print or export the existing grid layout, the possible export formats are ASCII File, CSV Format, HTML Document or an Excel Document.

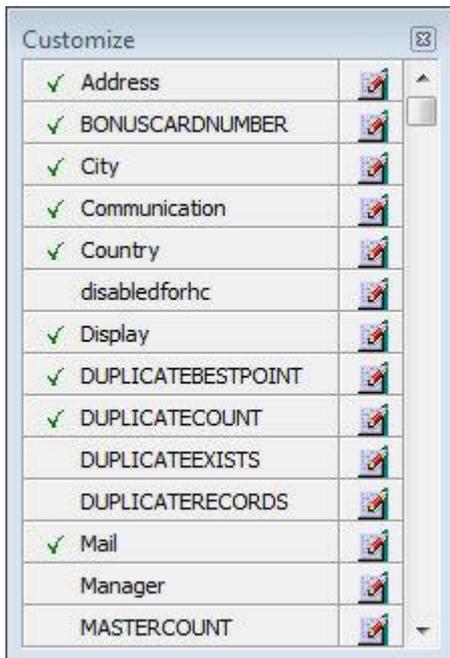
Note: The print or export function should be used before changes to the grid will be saved.

How to customize a grid

1. Place the cursor in the grid and right-click to display the short-cut menu.



2. Select CUSTOMIZE to open the customize screen.



The fields already used are marked with a green check mark.

3. Click the PENCIL button to view or change the column properties.

Column Properties

Field	Description
Field name	The field name as it is defined in the database table.
Caption	The field caption.
Fixed	Defines if the column will be fixed to the left side, when scrolling to the right to view additional fields of the grid. Columns marked as fixed are highlighted grey.

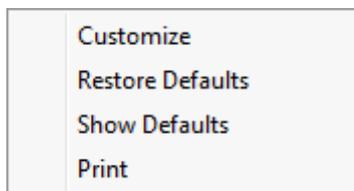
4. To move a field to the grid, select the field and drag it to the required position.
5. Click the  in the top right-hand corner to close the customize screen.
6. A message is displayed asking if you want to store the grid layout.



7. Select YES to save the changes or No not to save any changes.

How to remove a column from a customized grid

1. Place the cursor in the grid and right-click to display the short-cut menu.



2. Select CUSTOMIZE to open the customize screen.
The fields already used are marked with a green check mark.
3. On the grid point to the column to be removed and drag it to the customize screen; yellow arrows are displayed at each end of the column name.
Once the column has been removed the green check mark is removed from the field name on the customize screen.
4. Click the  in the top right-hand corner to close the customize screen.
5. A message is displayed asking if you want to store the grid layout.
6. Select YES to save the changes or No not to save any changes.

How to create a customised grid view for profile search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the profile search.

 This functionality is controlled by the parameter CUSTOM VIEW IN PROFILE SEARCH under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMXCMSSEARCH has to be amended.

Example: "Adding the financial account long description to the profile navigator"

The view has to be changed as follows:

```
CREATE OR REPLACE FORCE VIEW v8_sys_customxcmssearch
(customxcmssearch_xcms_id, zfac_longdesc)
AS SELECT xcms_id customxcmssearch_xcms_id,
(select zfac_longdesc from zfac where zfac_actvalidfrom is not null and
zfac_actvaliduntil is null and xcms.xcms_id=zfac.zfac_xcms_id and rownum=1)
zfac_longdesc
from xcms;
```

The fields from the custom view are automatically added to the grid.

How to create a customised grid view for reservation search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the reservation navigator.

-  This functionality is controlled by the parameter CUSTOM VIEW IN RES. NAVIGATOR under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMXCMSSEARCH has to be amended.

Example: "Adding the housekeeping status to the reservation navigator"

How to create a customised grid view for booking search

Users familiar with the Fidelio Suite8 table structure and fields can create a customised grid view for the event booking search.

-  This functionality is controlled by the parameter CUSTOM VIEW IN BOOKING SEARCH under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.
To add fields to the Grid Customization dialog box, the view V8_SYS_CUSTOMYBOMSEARCH has to be amended, however it must contain the field customybomsearch_ybom_id.

Example: "How to display the function type description"

The view has to be changed as follows:

```
CREATE OR REPLACE FORCE VIEW V8_SYS_CUSTOMYBOMSEARCH
AS
SELECT
ybom_id customybomsearch_ybom_id,
yfty_longdesc
from
ybom, yfty
where
ybom_yfty_id=yfty_id(+);
```

 Customization functionality is controlled by the user right EDIT under Setup → Configuration → Users → User Definition → Rights → Miscellaneous → Grid layout Customization.

 Print functionality is controlled by the user right PRINT GRID under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Customising the HTML display

The HTML display may be customised according to the requirements of the property. The customization options available when placing the cursor on the HTML display and right-clicking are:

- PRINT - prints an exact copy of the HTML display. The print page margins and the actions to take if the HTML printout is too large for the defined paper size can be defined in the configuration.
- PRINT WITH SETUP - displays the printer options and then print the HTML display.
- VIEW SOURCE - displays the HTML code; no changes can be made.
- EDIT TEMPLATE WITH NOTEPAD - opens the relevant *.htm and *.qry in notepad. Users with HTML programming knowledge can edit these files to meet the requirements of the property.
- EDIT TEMPLATE WITH ASSOCIATED APPLICATION - opens the relevant *.htm and *.qry with the program associated with these file types. Users with HTML programming knowledge can edit these files to meet the requirements of the property.

How to use HTML Expressions to customize the HTML display

Properties can configure and store customised html files in the Version 8 directory for htm files. The files are displayed in Suite8 either by logged in user, user language, customised htm files for all users or language specific htm files for all users.

The priority Suite8 uses to determine which file to use is in the sequence as listed:

- Customised htm file by user initials
To display a customised htm file by user initials, the htm file has to be called `USR_USERINITIALS_HTMLFILENAME.HTM`.
Example: For a user with the initials DS the file has to be called `usr_ds_quickinfo.htm`.
- Customised htm file by user language
To display a customised htm file by user language, the htm file has to be called `CUST_LANG_LANGUAGE SHORT DESCRIPTION_QUICKINFO.HTM`.
Example: If the language short description is F for French, the user has to select this language under User Settings → Startup → Language and the file, such as `quickinfo.htm` has to be called `cust_lang_f_quickinfo.htm`.
- Customised version for all users
To display a customised version of htm files for all users, the html files have to be called `CUST_HTMLFILENAME.HTM`.
Example: `cust_quickinfo.htm`.
- Customised version by language
To display a customised version by language, the html files have to be called `LANG_SHORT DESCRIPTION OF THE LANGUAGE_HTMLFILE.HTM`.
Example: `lang_f_quickinfo.htm`, where f stands for the short description of the language.

If none of these files can be found then the standard htm file is displayed

How to hide or show expressions depending on activated features or license

The following expression can be used to hide for example, Conference Information on the HTML file when working with the small business edition:

```
if ({const isBnB})=(1)}/{if}{else} {if {feature Meeting Planner}} Conference  
{runquery 2}
```

 Customization functionality is controlled by the user right HTML source view and edit under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

 The print page margins and the actions to take if the HTML printout is too large for the defined paper size are defined via the option HTML PRINTOUT under Setup → Configuration → Global Settings → Miscellaneous → Visual Appearance 4.

Favourites

The Favourites shortcut toolbar allows you to keep your most frequently used options right where you can find them. Your most used options can be added to the Favourites shortcut toolbar where they are more noticeable and more easily organized to suit your purposes.

To make the most of the Favourites shortcut toolbar, you need to organize the options in it; this can be done using drag and drop.

In user settings the Favourites shortcut toolbar can be set to be listed first and will then be the default shortcut toolbar opened when logging on to Fidelio.

Note: The Favourites shortcut toolbar cannot be removed from the toolbar.

How to add an option to the Favourites shortcut bar

1. Click one of the coloured shortcut toolbars on the left to list the options on that toolbar.
2. Right-click the option that you want to add, and then click ADD TO FAVOURITES on the shortcut menu.

The option is now listed on the Favourites shortcut toolbar.

3. Repeat Steps 1 and 2 for each option that you want to add.

Note: Options from Web Services cannot be added to the Favourites shortcut toolbar.

How to delete an option from the Favourites shortcut bar

1. Click the FAVOURITES shortcut toolbar on the left to list the options.
2. Right-click the option that you want to remove, and then click DELETE BUTTON on the shortcut menu.

The option is removed from the Favourites shortcut toolbar.

3. Repeat Steps 1 and 2 for each option that you want to remove.

How to reorganise the options on the Favourites shortcut bar

1. Click the FAVOURITES shortcut toolbar on the left to list the options.
2. Select the option to be moved and then left-click and hold the mouse button while you drag the option to its new location on the toolbar.
3. Repeat Steps 1 and 2 for each option that you want to move.

 On the toolbar the Favourites shortcut bar can be listed first by selecting the option FAVOURITE BUTTONS ON TOP under Miscellaneous → User Settings → Appearance Tab.

Logging off, Exiting Suite8 and Locking the Station

The windows menu consists of the following options:

- Close All - closes all open screens and dialog boxes.
- Lock Station - locks the workstation.
- Logout - closes all open screens and logs off Suite8.
- Exit Application - closes all open screens and exits the application.

Options	Description
Close All	<ul style="list-style-type: none">▪ Click the WINDOWS menu and the option CLOSE ALL. All open screens and dialog boxes are closed.
Logout	<ol style="list-style-type: none">1. Click the WINDOWS menu and the option LOGOUT All open screens and dialog boxes are closed and the Login screen appears. A new user can now login.2. To close the application completely click CANCEL. Suite8 is closed and the desktop appears.
Exit Application	<ul style="list-style-type: none">▪ Click the WINDOWS menu and the option EXIT APPLICATION. Suite8 is closed and the desktop appears.
Lock Station	<ul style="list-style-type: none">▪ Click the WINDOWS menu and the option LOCK STATION. All open screens and dialog boxes are closed and the Login screen appears. A new user can now login.

 Lock Station - the open screens and dialog boxes from the user who locked the station will not be closed if the parameter LEAVE OPENED SCREEN ON SWITCH USER is selected under Setup → Configuration → Global Settings → Generic → Generic 3 tab.

Customer Profiles

A profile is a record of information about an individual guest, company, agent, source, vendor, meeting planner or booker. Profiles comprise basic non-varying information: such as the guest/company/agent name, addresses, communications, language, as well as marketing information, links to other profiles, notes and statistical information about future and previous hotel stays and conference bookings.

Key features of Customer Profiles are:

- The ability to store an unlimited number of profiles.
- The ability to define multiple profile types.
- The ability to define multiple addresses and communication methods pre profile with the possibility to define one of each as the primary.
- The ability to store an unlimited number of profile notes.
- The option to assign different relationships. Relationships can be built between all profiles, for example, between master accounts and sub-accounts, individual profiles to company profiles and between family members.
- The system tracks general marketing information such as market segment, revenue potential, action codes and industry codes. In addition customised marketing information can be defined.
- The ability to create a graphical organization chart based on the individual profiles linked to a company and their relations as defined in the system.
- The ability to print letters and send emails directly from within V8 whilst keeping a history of all sent correspondence.
- Freely definable HTML display in profile search screen.

Profile Search

The main profile screen is called the NAVIGATOR and is divided into 4 distinct areas:

- Query - consists of multiple basic profile search criteria and an advanced query option.
- Query Results - the results of the query shown in a grid format.
- Tree View - a tree listing of all the details associated with this profile including address, communications, linked profiles, family members, tasks & activities, room reservations, conference bookings and history. The history branch displays the first 200 history records and records prior to this are located under the branch Old History. The reservation and history branches may be divided in to up to three sub-branches, RESERVATIONS AS GUEST is always displayed, RESERVATIONS AS LINKED PROFILE and RESERVATIONS AS MULTI-GUEST are only displayed if reservations with this type exist. Via the tree, the profile and all linked details can be edited and new details such as address, communications, tasks & activities, bookings and reservations can be added.
- HTML page - free definable HTML display which by default has a list format or a 'big' format where the details are displayed in a non-grid style format. The HTML File can be printed by using the right mouse click.

Entering a profile query

The query screen is split into three sections:

- The basic search criteria
- The advanced query options
- The profile view selection

The basic search criteria

You may fill in multiple fields to narrow the search criteria. The actual query is displayed in a script format in a window on the right hand side of the screen. The list of profiles displayed is in alphabetical order. The fields are explained in the table below:

Fill in this field	With this information
Name	The company name, the last name of an individual or the mail name.
First Name	The individual's first name.
City	The city located in the primary address.
ID (Profile ID)	The ID number generated by the system.
Type	The type of profile.
Master Only	Limits the search to master companies, which is, companies that are linked to sub-companies.
Excl. Sub Companies	Limits the search to companies that are master companies or not linked to any sub-companies.
Show Family Members	Family members who are marked as HIDE on the profile family or more fields tab will be shown when selecting this check box. Note: This option is displayed only if the parameter ENABLE FAMILY WIZARD is active.
Disable remote search	Temporarily disables the remote profile search. The search option then returns only local profiles and not profiles in the master hotel. This option is parameter controlled.

 The option Disable remote search is controlled by the parameter SEARCH REMOTE ON PROFILES GRID under Setup → Configuration → Global Settings → Hotel Connector → Hotel Connector 1 tab.

 Show Family Members functionality is controlled by the parameter ENABLE FAMILY WIZARD under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

Note: The profile name search considers values in the fields:
XCMS_NAME1, XCMS_NAME2 and XCMS_NAME3.

The advanced query options

The advanced query consists of three selection fields:

- The first allows you to select from a drop-down list of query possibilities.
- The second limits the query to a second level or gives a choice of conditions.
- The third field requires either a free-format value or for the user to select a possible value from a drop-down list.

The fields are explained in the table below:

Advanced Profile Search dialog box

Field	Choice / Condition	Value
Account Manager	equal to / not equal to	All users defined in the system.
Address Verified (Licence Controlled)	Not validated Validated To be manually validated Not valid	
Central Match Point	Empty Not empty Equal Greater than Smaller than Not unique candidate	A number of points for equal, greater than or smaller than. Only valid for Hotel Connector.
Communication	Email / home page / Fax / Phone	A specific email address / home page / fax or phone number in any of the stored address's.
Country	equal to / not equal to	A selected country code in the primary address.
Creation Date	equal to / not equal to	A selected date.
Duplicate	Not processed	Duplicates not processed.
	Processed	Duplicates processed.
	Duplicate exists	Profiles where potential Duplicates exists.
	No duplicate	Profiles where no Duplicates exist.
	Explicit no duplicate links	Profiles where potential duplicate exist but have been marked as not a duplicate. (Profiles having xndl records.) The pot. Duplicate grid will show the linked profiles. It is possible to delete the xndl link by pressing Not a duplicate button. Profiles marked as not a duplicate, will be excluded from the duplicate search.
	Duplicate point is equal to	Profile where duplicate value is equal to entered value.
	Duplicate point is higher than	Profile where duplicate value is higher than entered value.
Global Id	Empty / Not empty	Only valid for Hotel Connector.

Memberships	Dependant upon the membership types that have been configured. Examples are: A/R, IATA and VAT numbers.	The relevant number.
Save Profile	Yes/No	YES searches for profiles marked as 'Save Profile'. No searches for profiles not marked as 'Save Profile'.
Street	like/ not like	A specific street in the primary address. The search is not case sensitive and the search criteria can also be entered using wildcards (%).
Upload point	Empty Not empty Equal Greater than Smaller than	A number of points for equal, greater than or smaller than. Only valid for Hotel Connector.
User Created	equal to/ not equal to	All users defined in the system.
ZIP Code	Equal to Not equal to Start with	A specific zip code in the primary address.
Attribute Categories	The attribute categories listed are dependant upon the categories setup in the configuration.	
Action Codes	equal to / not equal to	A specific action code.
Competition Codes	equal to / not equal to	A specific competition code.
His Profile Type	equal to / not equal to	A specific HIS profile type.
Industry Codes	equal to / not equal to	A specific industry code.
Influence	equal to / not equal to	A specific influence code.
Mailing Codes	equal to / not equal to	A specific mailing code.
Newspapers	equal to / not equal to	A specific newspaper code.
Potential	equal to / not equal to	A specific potential code.
Pref. Distribution	equal to / not equal to	A specific preferred distribution code.
Primary Sales Office	equal to / not equal to	A specific primary sales office.
Priority	equal to / not equal to	A specific priority code.

Product Interest	equal to / not equal to	A specific product interest code.
Restaurant Table Type	equal to / not equal to	A specific restaurant table type.
Sales Territory	equal to / not equal to	A specific sales territory.
Scope	equal to / not equal to	A specific scope code.
Scope City	equal to / not equal to	A specific scope city.
Simple Commission	equal to / not equal to	A specific simple commission code.
Source	equal to / not equal to	A specific source code.
Spa Items requested	equal to / not equal to	A specific spa item code.
Specials	equal to / not equal to	A specific specials code.
VIP Code	equal to / not equal to	A specific VIP code.
Customised SQL statements	Custom SQL search statements are indicated by a dash (-) in front of the name.	

 Hotel Connector functionality requires an additional license code.

 The option ADDRESS VERIFIED is controlled by the licence V8 CRM ADDRESS DOCTOR INTEGRATION INTERFACE under Setup → License → V8 Sublicences → Software interfaces.

The profile view selection

The profile view selection by default displays all active profiles, however, the profile display can be limited to only front office profiles, to only conference and catering management profiles and to only active or inactive profiles with each category.

Profile View	Shows
PMS	Only profiles which have the DISPLAY options 'FO' or 'ALL' selected in the profile screen.
CCM	Only profiles which have the DISPLAY options 'CCM' or 'ALL' selected in the profile screen.
Active	Only active profiles - selected automatically when either PMS or CCM is selected.
Inactive	Only inactive profiles (The ACTIVE field in the profile is not selected).

Note: The actual query is displayed in script format in a window on the right hand side of the screen and as long as the Filter is not cleared by pressing the CLEAR button, each additional query will be added to the actual query list.

Wildcards

The search criteria can also be entered using wildcards (%). For example, M%ller will return Miller, Muller, %Bank will return Investment Bank, American Bank and Fidelio% will return Fidelio GmbH or Fidelio Inc. A search using wildcards (%) in the profile name search considers values in the fields: XCMS_NAME1, XCMS_NAME2 and XCMS_NAME3. In an individual profile these are the fields, Last Name, Middle Initial and First Name respectively. In a company profile these fields are the three lines in the Full Name box.

Search Name functionality

Names entered with an umlaut or special character, such as 'Müller' will automatically update the search name field with the name without umlaut or special character, such as 'Muller'. When entering Muller in the name field and pressing the Search button, the search will return 'Muller' and 'Müller'.

Activating the search

To activate the search the user must click the SEARCH button. Due to the time it may take to search on a large database two different search options have been implemented. Clicking the SEARCH button will return the maximum number of profiles defined in configuration, with the question to display more if there are more to be displayed. Clicking the FULL SEARCH button will display all profiles matching the criteria.

A list of profiles that match what you have specified is displayed. For example, if you specify a search for the Name "Thomas", the profile list grid shows a list of all profiles that have the name "Thomas". Clicking the CLEAR button resets the query criteria and clears both the tree and html displays.

Narrowing the search

Once the search has been performed the search can be further narrowed by using the FIND IN GRID button.

The FIND IN GRID button allows the user to:

- Search on all or specific columns within the grid.
- Search for specific text
- Match the case or search for whole words only.
- Control the direction of the search.

Scrolling in Edit Mode

Once the profile is displayed in edit mode then the previous and next profiles can be displayed as follows:

- Press CTRL+PAGE UP to display the previous profile in edit mode.
- Press CTRL+PAGE DOWN to display the next profile in edit mode.

 A full explanation of the profile screen search behaviour can be found in the Suite8 Configuration Manual under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

 The adding of the first profile from the search results to the tree automatically is controlled by the parameter ADD TO TREE AUTOMATICALLY under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab. If this parameter is not activated then no profile is added to the tree unless the TREE DELAY settings apply or the cursor is moved to another profile.

 The task and activity types which are displayed in the profile tree when a profile is selected on the profile navigator are defined via the option ACTIVITY/TASK TYPES IN PROFILE TREE under Miscellaneous → User Settings → Profile tab. If no specific task and activity types are selected then all tasks & activities are displayed in the profile tree.

 The maximum number of lines displayed controlled by the parameter MAXIMUM LINES IN LIST under Setup → Configuration → Global Settings → Search Screens 2 tab.

 An entry in the Name, First Name or City fields and pressing the tab key to exit the field, performs an immediate profile search if the parameter SEARCH PROFILES WHEN TAB OUT FROM NAME FIELD is selected under Setup → Configuration → Global Settings → Miscellaneous → Search Screens 2 tab.

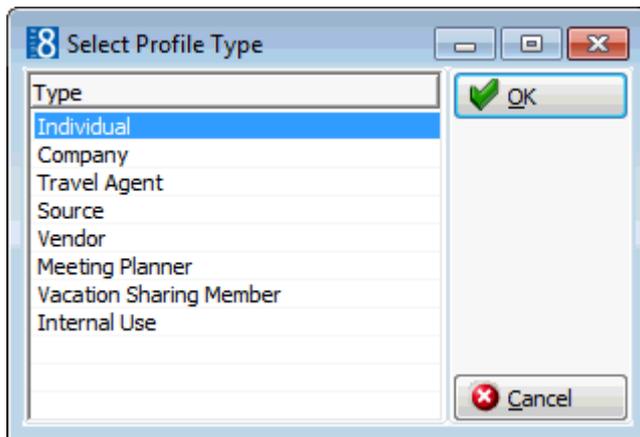
Individual Profile

New individual profile

You can create a profile specifically for an individual guest. There are two distinct types of profile screens, one for individuals and a second one for all other profile types.

To create a new individual profile

1. On the profile search screen click the NEW PROFILE button.
2. The Select Type dialog box is displayed, select the profile type required, for an individual profile select INDIVIDUAL and click OK.



Note: The types of profiles available are dependant upon what has been configured by your property.

3. The profile screen appears displaying NEW INDIVIDUAL PROFILE and the profile ID number on the title bar at the top of the screen.

The profile screen for all the profile categories consist of several screens, each one represented by a tab, for an explanation of each tab see the Profile Tabs table below.

Profile	More Fields	Notes	Marketing	Linked Profiles	Linked Documents	Linked Pictures	Family
---------	-------------	-------	-----------	-----------------	------------------	-----------------	--------

4. The PROFILE tab is displayed by default. On this screen the field LAST NAME is in bold letters, this indicates that it is a mandatory field. All other fields are optional.
5. Fill the optional fields by typing information or selecting information from the drop-down lists. Several fields, namely address, communications and guest card info allow multiple entries of data therefore when entering data here a separate screen is displayed and an entry may be added, edited or deleted.
6. For an explanation of the fields on the profile screen, see the tables below:

Profile Tabs

Profile Tab	Details
Profile	A record of the main information about an individual guest, company, travel agent, vendor, meeting planner or source profile.
More Fields	A continuation of the profile screen with additional information.
Notes	An unlimited number of notes can be attached to each profile.
Marketing	On this tab marketing information for both pre-defined categories and customized categories is stored.
Linked Profiles	On this tab new links to other profiles are made, and existing links can be viewed, edited or deleted.
Linked Documents	On this tab documents can be added to, and already attached documents can be viewed or removed from the profile.
Family	On this tab family members can be entered. For each family member entered a new profile will be created. This tab is only displayed for individual profiles.
Statistic Report	On this tab statistical information such as the number of stays, number of nights and the revenue is shown for the selected profile.



The display of the Family tab is controlled by the parameter `ENABLE FAMILY WIZARD` under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

Basic Profile Information

Fill in this field	With this information
Last Name (Mandatory)	Enter the guest's last name with appropriate capitalization. The way a name is entered in the profile screen is the way it will appear in letters and folios. As searches are not case-sensitive, they will not be affected by capitalization.
MI (Middle Initial)	The guests middle name or initial.
First Name	Enter here the guest's first name.
Mail Name	Enter here the name the guest prefers to use, e.g. if the name is David, but he prefers to be called Dave.
Position	Enter the guest's job title or position. Note: The position displayed is dependant upon the selected CONTACT PREFERENCE.
Department	Enter the guest's job department. Note: The department displayed is dependant upon the selected CONTACT PREFERENCE.

Language	The default language defined in the configuration is selected, but this can be changed as required. This controls the language the guest should be addressed in and should receive correspondence in.
Title	This field should be used for aristocratic titles such as, Lord, Lady, etc
Address Greeting	Select the address greeting code from the drop-down list. This can then be changed as required.
Letter Greeting	The letter greeting is automatically completed based on the selected address greeting. This can then be changed as required.
Contact Preference	<p>The default contact preference is the current profile, however all linked profiles will be shown in the drop-down list.</p> <p>Note: If an individual profile is linked to a company and the contact preference is the company then the address and communication details displayed are for the company but they are view only.</p> <p>The position and department displayed are dependant upon the contact preference:</p> <p style="padding-left: 40px;">If the contact preference is 'individual' then the individual position/department can be entered.</p> <p style="padding-left: 40px;">If the contact preference is one of a linked company then the position/department of the linked company can be entered.</p>

Address Information

Fill in this field	With this information
Address	<p>An unlimited number of address's can be entered per profile. Two counters display the total number of address for this guest and the total per the selected address type.</p> <p>One of the entered addresses must be defined as primary address.</p> <p>Click the NEW button to enter a new address.</p> <p>Click the EDIT button to edit an existing address.</p> <p>Click the DELETE ADDR button to delete an existing address.</p>
Address Type	Select the address type from the drop-down list.
Primary	Check this box for the address type that is the primary address type. By default the first address entered is marked as the primary address.
Country	Select the country code from the drop-down list.
Zip	Enter here the zip code or postal code.
City	Select the city from the drop-down list or enter the city name (max 60 characters).

	Note: The city may be completed automatically according to the entered zip code. If a zip code has several cities assigned then a selection box is displayed.
Town	Select the town from the drop-down list. Note: This is an Italian legal requirement and is only available if the parameter <code>ADVANCED DOCUMENT INFORMATION</code> is activated.
State	Enter the state code here.
Street 1	Address line 1
Street 2	Address line 2
Street 3	Address line 3

 The address format for both display and printing is defined for each country via the option Countries under Setup → Configuration → CRM.

 The addition of the TOWN to the address information is controlled by the parameter `ADVANCED DOCUMENT INFORMATION` under Setup → Configuration → Global Settings → Country Specifics → Country Specifics 1 tab → Italian Settings.

Note: When changing the primary profile address the question "Do you want to apply changes to the family members?" may be displayed. If answered with yes then a list of family members with their addresses is displayed and the user can select which family members to apply the change to.

Communication Information

Fill in this field	With this information
Communication	An unlimited number of communications can be linked to each profile. Click the NEW button to enter a new communication type. Click the EDIT button to edit an existing communication. Click the DELETE COMM button to delete an existing communication.
Type	Select the communication type from the drop-down list.
Value	Enter the value for the communication type, e.g. telephone number, email address or web page. Note: If email validation is active then valid email addresses are highlighted green and invalid email address's highlighted red. An email address marked as invalid can still be overwritten and accepted. Note: If a connection to the Internet exists, emails can be send directly from within V8 (MS Outlook).

Primary	Check this box for the communication type that is the primary communication method. By default the first communication entered for each type of communication, is marked as the primary communication. This can be changed as required.
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Other Information

Fill in this field	With this information
Primary Contact	Only displayed if the individual is linked to a company. It defines that this individual is the primary contact of the company. By default the first profile linked to a company is set as the primary contact.
Mailing Contact	Only displayed if the individual is linked to a company. Defines if the contact should be available to receive mailings.
Family Mailing Contact	Only displayed if the profile is linked to a family member. Family members which are not defined as the family mailing contact can be excluded when running mailing queries.
Active	By default this checkbox is marked indicating that the profile is active. Clear this checkbox to mark the profile as inactive and enter a date and a reason for placing the profile as in-active. Profiles with active tasks & activities, reservations, bookings, or financial accounts cannot be set to inactive.
Trace Freq.	Indicates the number of weeks after which the guest should be contacted. This is usually set to 26 or 52 to contact the guest once or twice per year. This will automatically create a follow up task under tasks & activities. Once this task is completed the next one will be created in the number of weeks entered.
Display	Select the CCM radio button if this profile is a CCM only profile. Select the FO radio button if it is a FO only profile. The default is that the profile will be displayed in all modules.
Sales Manager	If the properties account manager for this profile is known select from the drop-down list, otherwise leave blank.
Birthday	Enter here the guests date of birth, the year does not have to be completed.
Place	Enter here the guest's place of birth.
Gender	Depending on the address greeting setup the gender will be filled in automatically but can be changed as required.
Nationality	Select the nationality code from the drop-down list.

	The nationality is automatically completed when entering a nationality on the personal documents dialog box or filling the information using passport scanner.
Preferred Currency	The entry in this field, to be chosen from a drop-down list of currency codes, indicates the preferred currency. Information purposes only.
Preferred Rooms/Categories	Select rooms, categories, tables or restaurants from the drop-down list in order to enter the guest's preferences. It is also possible to exclude as oppose to include preferences. The preferred rooms and categories are listed when entering a new reservations Tables and restaurants are only listed if the table reservation licence is active.
Room Features	A drop-down list with room features: smoking or non-smoking rooms, preferred floor, near to the elevator, etc. When you block the guest's room or check the guest in, the system searches only for rooms with these features.
Credit Status	C - Cash Only Indicates that this profile can be accepted on cash-only basis. A warning message will be displayed when making a new booking or reservation with this profile. A reason for the cash list rating can be entered. R - Restricted Indicates that this profile has been placed on a restricted list. This usually indicates that the hotel does not wish to accept reservations or bookings with this profile. A warning message will be displayed when making a new booking or reservation. A reason for the restricted rating can be entered. A - Accounts Receivable Indicates that this profile has been given approval for city ledger billing. A reason for city ledger approval can be entered.
Pref. Distribution	Defines how the customer wants to receive correspondence. Select the method of preferred distribution such as letter, email or fax from the drop-down list. This is displayed when printing letters but is for information purposes only.

Guest Card Information

Fill in this field	With this information
Guest Card Info	Click the NEW button to enter a new guest card. Click the EDIT button to edit an existing guest card. Click the DELETE CARD button to delete an existing guest card.

	Click the DISPLAY button to display information about an existing guest card. Various screens are displayed depending on the type of card, for example, the Bonus Point Card screen is displayed for bonus type cards and the Rebate Card Information screen for rebate type cards.
Guest / Credit	Selecting one or the other radio button will change the screen entry from guest card to credit card.
Type	Select the guest card/membership type from the drop-down list. When selecting the membership type A/R the A/R Accounts Navigator screen is displayed.
Number	Enter the guest card/membership number.
Expiry (MM/YY)	The expiry date of the guest card. This option is displayed if the expiry check is activated in membership type configuration or if the rebate card option Valid until end of calendar unit is selected.
Start Date	Start date of the contract. Required only for a guest card type defined with the role CONTRACT NUMBER.
End Date	End date of the contract. Required only for a guest card type defined with the role CONTRACT NUMBER.
Sign Up Date	Sign-up date of the contract. Required only for a guest card type defined with the role CONTRACT NUMBER.
Credit Card	Click the NEW button to enter a new credit card. Click the EDIT button to edit an existing credit card. Click the DELETE CARD button to delete an existing credit card.
Card Type	Select the credit card type from the drop-down list.
Card Number	The credit card number.
Expiry (MM/YY)	The expiry date of the credit card.
Holders Name	Name on the credit card.

 The main profile tab is controlled by the user right PROFILE DETAILS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles. If both the VIEW and EDIT rights are enabled then the fields are accessible and all other rights applicable to the screen are taken into consideration. If the EDIT right is denied then the fields on the main profile tab are view only.

 Each profile tab is controlled by its own user right under PROFILE TABS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles. If the EDIT right is enabled then the fields are accessible and all other rights applicable to that screen are taken into consideration. If the EDIT right is denied then the fields on that tab are view only.

 The default language for profiles is defined via the option DEFAULT LANGUAGE FOR PROFILES under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

-
-  Trace Frequency Type is defined via the option TASK TYPE FOR TRACE FREQUENCY under Setup → Configuration → Global Settings → Profile → Profile 1 tab.
 -  The creation, editing and deletion of AR Account Numbers is controlled by the user rights under A/R ACCOUNT NUMBER under Setup → Configuration → Users → User Definition → Rights → Customer Profile.
 -  The expiry date for guest cards is displayed only if the expiry check option is selected when defining the MEMBERSHIP TYPES under Setup → Configuration → CRM.
 -  Table Reservations functionality is controlled by the licence TABLE RESERVATIONS under Setup → License → V8 Sublicenses → Property Management.
 -  Email validation functionality is controlled by the parameter VALIDATE EMAIL ADDRESS and the completion of the EMAIL VALIDATION URL under Setup → Configuration → Global Settings → Profile → Profile 2 tab.
 -  With the myfidelio or myCCMfidelio home page activated then a web login and web password may be displayed on the profile edit screen.

Individual Profile More Fields Tab

The More Fields tab stores additional profile information, such as VIP codes, market segment and rate code information.

Click on the MORE FIELDS tab to display the Profile More Fields screen.

More Fields Information

Fill in this field	With this information
No Mailing	Select this option if no mailings should be sent to this profile.
No E-Mailing	Select this option if no email should be sent to this profile.
Save Profile	This checkbox is selected by default and ensures that profiles will not be set to inactive during night audit after the time period defined in configuration.
Market Segment	Defines which market segments are valid for this profile.
Rate Codes	If the guest has a special rate code, enter it here. This rate code is then suggested every time the guests name is entered on the Rate Query (Ctrl + R) or when entering a new reservation. See: Rate Linkage

VIP Code	Indicates that the guest is a regular guest or is to receive VIP treatment and the level of treatment. VIP codes can be assigned a colour and guests with a specific VIP code attached will be shown in this colour on the Room Rack (Ctrl + L).
Hide Family Member	Profiles with this checkbox selected will only show on the profile search result grid if the SHOW FAMILY MEMBERS box is selected also. This option is only displayed if the parameter ENABLE FAMILY WIZARD is active and the profile is a family member.
Wedding Day	Select the wedding anniversary date from the calendar.
Virtual Numbers	Used to assign virtual numbers.
Rebate Code	Used to assign a rebate code. This option is only displayed if the parameter ENABLE REBATE LINK is active.
Managers	Used to create the organisational chart. From the drop down list select the person that is the superior manager of the currently selected individual.

Note: If a company has only one linked individual profile, then the MANAGER field is not displayed on the MORE FIELDS tab of the individual profile as a manager cannot be assigned if there is only one linked profile.

The same applies when two individual profiles have been linked to a company and a manager has already been assigned to one of the profiles. In this case, the second individual profile will not be shown in the MANAGER field.

Transponder Standard Arrangements

Fill in this field	With this information
Transponder Standard Arrangements	Click the NEW button to link a new standard Bus/Group template. Click the EDIT button to edit a standard Bus/Group template. Click the DELETE button to remove a linked template. Accelerator keys are indicated with (1) for New (Alt + 1), (2) for Edit (Alt + 2) and (3) for Delete (Alt + 3).
Code	The code assigned to the selected bus/group template.
Name	The description of the bus/group template.
Default	Indicates which bus/group template is the default.

Personal Document Information

8 Add/Edit Personal Document

Document Type PAS Passport

Primary

Guest Name Aceti Ralph

Name in Doc.

Number

Country

Nationality US American

Valid From **Valid Until**

Issued By

Place of Issue

Country of Issue

Place of Birth

Country of Birth

Date of Birth 08/05/2003

OK

Scan Passport

Cancel

Personal Document Information

Fill in this field	With this information
Personal Documents	Click the NEW button to enter a new personal document. Click the EDIT button to edit an existing personal document. Click the DELETE button to delete an exiting personal document.
Document Type	Select the document type from the drop-down list.
Primary	Defines if this document is the primary document.
Guest Name	The guests name.
Name in Doc.	The guest name as written in the document.
Number	The number of the document, e.g. ID # or Passport #.
Country	Select the country code from the drop-down list.
Nationality	Select the nationality from the drop-down list. Completed automatically if the nationality has already been entered on the guest's profile. Entering the nationality here, either manually or using a passport scanner automatically completes the nationality information on the main profile tab.
Valid From - Valid Until	Dates that the document is valid from - until.
Issued By	The authority who issued the document.
Place of Issue	Name of the place where the document was issued.
Country of Issue	The country where the document was issued.
State of Issue	The state where the document was issued. Note: Italian legal requirement which is only displayed if the parameter ADVANCED DOCUMENT INFORMATION is active.
Place of Birth	Select the place where the document holder was born from the drop-down list. Completed automatically if the place of birth has already been entered on the guest's profile.
Country of Birth	Select the country where the document holder was born from the drop-down list.
State of Birth	Select the state where the document holder was born from the drop-down list. Note: Italian legal requirement which is only displayed if the parameter ADVANCED DOCUMENT INFORMATION is active.
Date of Birth	The guest's date of birth. Completed automatically if the date of birth has already been entered on the guest's profile.

Scan Passport	This option may be used to scan a passport or ID card.
 The following options are controlled by the parameter ADVANCED DOCUMENT INFORMATION FOR TURKEY under Setup → Configuration → Global Settings → Country Specific 1 tab.	
Father's Name	The name of the guest's father.
Mother's Name	The name of the guest's mother.
Reg. City	City where the guest's ID card was issued.
Reg. Municipality	Municipality where the guest's ID card was issued.
Reg. Street	Street where the guest's ID card was issued.

 Access to the More Fields tab is controlled by the user right **MORE FIELDS** under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Profile Tabs. If the **EDIT** right is enabled then the fields are accessible and all other rights applicable to More Fields screen are taken into consideration. If the **EDIT** right is denied then the fields are view only.

 The creation and deletion of VIP Codes is controlled by the user rights under **VIP CODES** under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Marketing Information.

 Transponder handling functionality is controlled by the parameter **TRANSPONDER HANDLING** under Setup → Configuration → Global Settings → Generic2 tab.

 The state options on the personal document information are controlled by the parameter **ADVANCED DOCUMENT INFORMATION** under Setup → Configuration → Global Settings → Country Specific 1 tab → Italian Settings.

 The linking of a rebate code at profile level is controlled by the parameter **ENABLE REBATE LINK** under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

Profile Notes

The notes tab stores information regarding the guest or company. Notes are divided up into user-definable categories and can be marked as viewable by the guest; guest viewable notes are highlighted in red. An unlimited number of notes can be added to each profile and a counter on the bottom left of the profile edit screen shows the number of existing notes for that profile.

Notes can be viewed, edited or added in one of three ways:

- Via the **NOTES** tab in the profile edit screen.
- Via the **OPTIONS** button next to the profile grid.
- Via the **NOTES** option on the Profile Tree.

How to add a new note via the profile

1. Click the **CUSTOMER RELATIONS** menu and select **PROFILES** or right-click on **PROFILE DETAILS** in the profile tree and select **EDIT** to display the Customer Profiles screen.
2. Search for and select the required profile, then click the **EDIT PROFILE** button.
3. Click the **NOTES** tab to display the notes dialog box.
4. Any existing notes are listed in the upper part of the dialog box.
5. Click the **NEW** button to display the Add note dialog box.

6. The DATE/TIME and USER are automatically completed.
7. Select a NOTE CATEGORY from the drop-down list.
8. Select the option GUEST VIEWABLE if the guest is allowed to view the note. Depending on the definition and setup of any customer correspondence, this option is used to control which notes should appear on contracts, offers or letters. Leave it empty if you do not want the guest to be aware of this note.
9. In the NOTE box enter the text for the note.
10. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.

11. Click OK to save the note.

How to add a new note via the options button

1. Click the CUSTOMER RELATIONS menu and select PROFILES or right-click on PROFILE DETAILS in the profile tree and select EDIT to display the Customer Profiles screen.
2. Search for and select the required profile, then select NOTES from the OPTIONS menu of the profile navigator.
3. Any existing notes are listed in the upper part of the dialog box.
4. Click the NEW button to display the Add note dialog box.

5. The DATE/TIME and USER are automatically completed.
6. Select a NOTE CATEGORY from the drop-down list.
7. Select the option GUEST VIEWABLE if the guest or company is allowed to view the note. Depending on the definition and setup of any customer correspondence, this option is used to control which notes should appear on contracts, offers or letters.
8. In the NOTE box enter the text for the note.
9. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.

11. Click OK to save the note.

How to edit a note

1. Search for and select the required profile, then select NOTES from the OPTIONS menu of the profile navigator.
2. Select the note to be edited and click the EDIT button to display the Edit Note dialog box.
3. Make any changes required and click OK to save the note.

How to delete a note

1. Search for and select the required profile, then select NOTES from the OPTIONS menu of the profile navigator.
2. Select the note to be deleted.
3. Click the DELETE button, a confirmation message is displayed.
4. Click YES, the note is deleted.

 Note Categories are defined via the option NOTES CATEGORIES under Setup → Configuration → CRM. Note Categories can be defined to be restricted and then only users with the appropriate user rights can view, edit, insert or delete a restricted note. Note categories can also be defined to pop-up when editing the profile.

 Restricted notes functionality is controlled by the rights under the user right RESTRICTED NOTES under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Text Templates

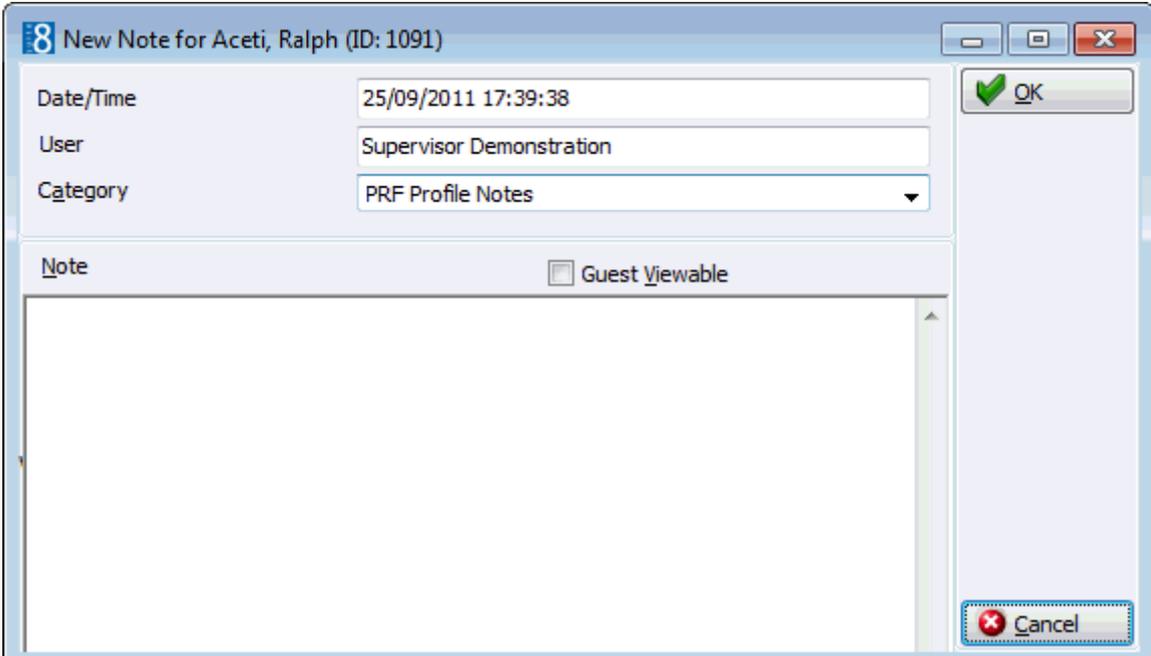
Text templates may be created and used where the same text is required very often or where the same basic text can be used and minor adjustments made.

Text templates can be created in one of two ways:

- Via the NOTES dialog box.
- Via the option TEXT TEMPLATES under Setup → Configuration.

How to add a template

1. Select any profile and click the NOTES button to display the notes dialog box.
2. Click NEW to open the Add Note dialog box.

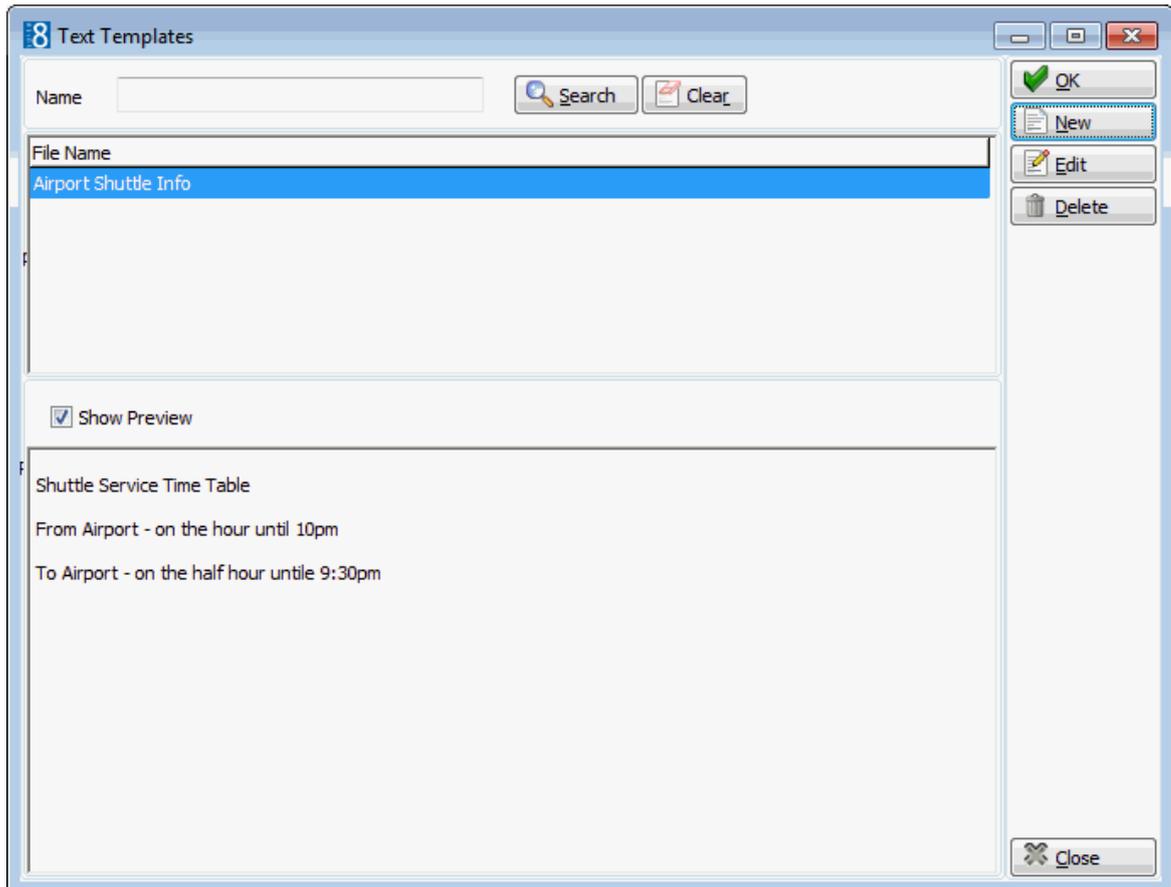


3. Enter the text required for the template.
4. Press ALT + E to export the text, the Text Template dialog is displayed.
5. Allocate a FILE NAME for the template.
6. Click OK to save the template.

7. The Add Note dialog is re-displayed; click OK to save the text as a note or CANCEL to exit from the Add Note dialog screen.
8. Click CLOSE to close the Notes dialog box.

How to import a template

1. Select any profile and click the NOTES button to display the notes dialog box.
2. Click NEW to open the Add Note dialog screen.
3. Place the cursor in the note box and press ALT + I to import a text template.
4. The Text Template dialog is displayed listing all available templates.



- To search for a template, enter a template NAME, click SEARCH.
 - To edit an existing template, click the EDIT button.
 - To create a new template, click the NEW Button.
5. Double-click the required template or highlight the required template from the list and click OK.
 6. The Add Note dialog is displayed with the template in the NOTE box.
 7. Make any adjustments necessary and click OK to save the note.
 8. Click CLOSE to close the Notes dialog box.

Note: Text template can also be imported in to the body part of the print screen when sending emails.

-
-  Access to the Notes tab is controlled by the user right NOTES under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Profile Tabs. If the EDIT right is enabled then the fields are accessible and all other rights applicable to the Notes screen are taken into consideration. If the EDIT right is denied then the fields are view only. This user right takes higher priority over the NOTES user rights.
 -  Adding or editing notes is controlled by the user right NOTES under Setup → Configuration → Users → User Definition → Rights → Customer Profiles.
 -  Note categories are defined via the option NOTES CATEGORIES under Setup → Configuration → CRM.
 -  Text templates may also be defined via the option TEXT TEMPLATES under Setup → Configuration → Miscellaneous.

Individual Profile Marketing Tab

The marketing tab stores a variety of marketing information about the profile, all of which are user definable. Each standard marketing category can be selected or not, according to the properties needs, for example, newspaper is not meaningful for company profiles and primary sales territory is not useful for a hotel with no regional sales office. Several standard marketing categories are available along with the possibility to define customized categories as required. Click on the MARKETING tab to display the Profile Marketing screen.

Note: If a user does not have the right to enter or delete an attribute, the selection box for the attributes is greyed out.

Individual Profile Marketing Tab

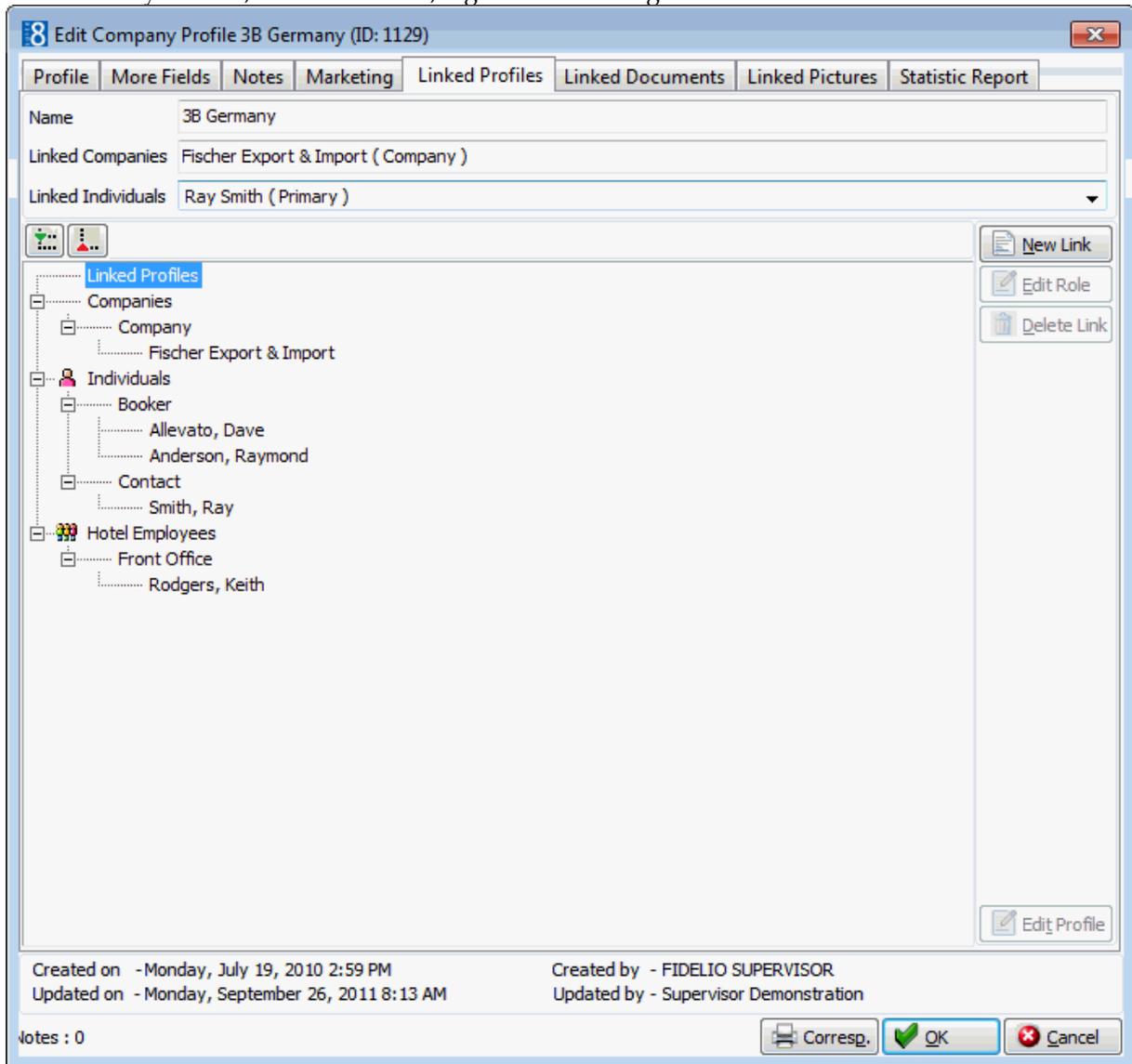
Fill in this field	With this information
Default Attributes	
Scope	Defines if the company operates locally, regionally, nationally, etc.
Scope City	Further defines the scope. If scope national was selected, the cities can be selected here.

Influence (Individual Profiles only)	Defines the influence of this individual within the company. Codes defined as influence will also be used as the role when linking individuals to companies.
Product Interest	Defines which products the customer is interested in - conferences, golf, weekend specials, etc.
Action Codes	Defines what action the hotel wants to take i.e. Christmas present, regular invitations etc.
Mailing Codes	Defines which mailings the customer should receive.
Newspapers	Defines the newspapers the customer wishes to receive.
Specials	Defines any specials that were configured.
Source	Defines the origin of the profile.
Defined Attributes	Reserved for attributes defined by the individual property. In configuration the property can create new list box fields and define where they should be displayed.
Managers	Defines the managers for this profile. The primary manager is assigned via the SALES MANAGER field on the profile edit screen; however additional managers can be assigned here.

-  The marketing tab is not displayed if the parameter HIDE MARKETING TAB is selected under Setup → Configuration → Global Settings → Profile → Profile 1 tab.
-  Access to the Marketing tab is controlled by the user right MARKETING under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Profile Tabs. If the EDIT right is enabled then the fields are accessible and all other rights applicable to Marketing screen are taken into consideration. If the EDIT right is denied then the fields are view only. This user right takes higher priority over the marketing category user rights.
-  Each marketing category has its own user rights. Inserting and deleting marketing categories are controlled by the user rights INSERT AND DELETE under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Marketing Information. When both rights are denied the drop-down box cannot be opened. With INSERT enabled and DELETE denied, new codes can be added but existing codes cannot be deleted. With INSERT denied and DELETE enabled, existing codes can be deleted but new codes cannot be added.
-  Attribute categories are defined via the option ATTRIBUTE CATEGORIES under Setup → Configuration → CRM. For each attribute category added a new category is created under MARKETING INFO. The elements for each new list box may then be added under the corresponding MARKETING INFO category under Setup → Configuration → CRM.
-  Attribute categories may be defined to be displayed only in specific locations, the additional list boxes are shown on the Profiles Edit screen under the Marketing Info tab and for Reservations either on the first page, on the multi-guest (profiles) tab, the Attributes tab or on the Special Attributes tab. Additionally an attribute can be defined to be copied from the profile to the reservation and/or to multi guest indicating that attributes linked to a guest or company profile are automatically copied to the multi guest page attributes when the attribute is attached to a profile and this is linked to a reservation on the multi guest page.

Linked Profiles

Many different types of links can be made between the different types of profiles. The type of link being made will determine the role options displayed, for example when selecting an individual link the roles offered may include colleague or contact. When linking a company profile the role selection may include, Decision Maker, Signs Check or Negotiator.



Profiles can be linked, unlinked or edited in one of two ways:

- Via the NEW or EDIT options under PROFILE DETAILS on the Profile Tree.
- Via the LINKED PROFILES tab in the profile edit screen.

The following types of links can be made:

- **Individuals to Company / Company to Individuals** - an unlimited number of individuals/contacts can be linked to one or multiple companies.
- **Company to Company** - a link between two or more companies can also be established. A typical example would be to link a travel agent to a company.
- **Master and Sub-Company** - relations between Master- and sub-companies can also be created in Suite8.
- **Individual to Individual** - relations between individuals such as colleagues or contacts can be established.

- Family Members - relationships between family members such as spouse, child or sibling can be established.
- Managers Assignment - An unlimited number of managers or hotel employees can be linked to an individual/booker profile. For the sales and conference module it is important to assign one or multiple managers to a customer profile.

Inactive linked contacts are greyed out and marked with an asterisk [*].

 On the Linked Profiles tab only roles defined via the option INDIVIDUAL LINKED ROLES under Setup → Configuration → CRM can be selected. Roles defined via the option FAMILY MEMBER ROLES under Setup → Configuration → CRM can only be linked on the Family tab or via the Profile tree → Profile Details → Family Members.

 Access to the Linked Profile tab is controlled by the user right LINKED PROFILES under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Profile Tabs. If the EDIT right is enabled then the fields are accessible and all other rights applicable to the Linked Profiles screen are taken into consideration. If the EDIT right is denied then the fields are view only. This user right takes higher priority over the LINKED PROFILES user rights.

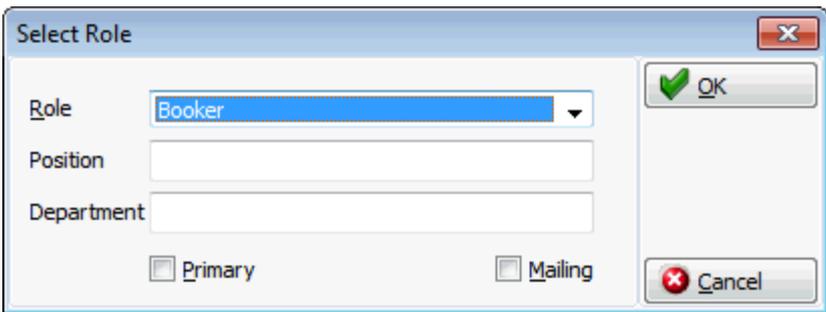
 Adding or editing links on the Linked Profiles tab is controlled by the user rights LINK INDIVIDUAL, COMPANY LINK, SUB COMPANY LINK, and FAMILY MEMBERS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles.

Linking Individual Profiles to Company Profiles

Individuals can be linked to more than one company. If an individual has been linked to one or multiple companies, the linked companies can be viewed and edited via the tab LINKED PROFILES in the profile edit screen of the individual and company or in the tree.

How to link an individual profile to a company profile via the profile tree

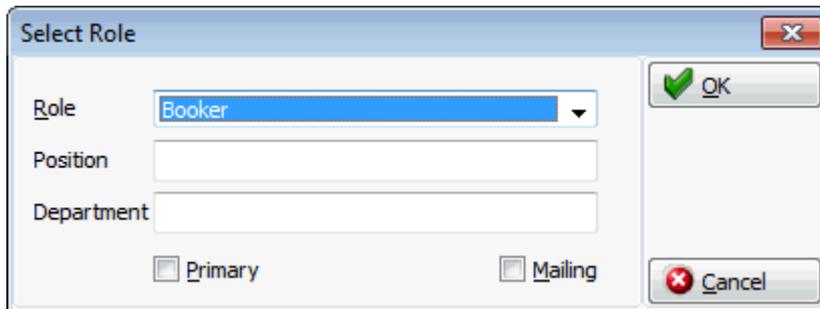
1. Highlight the company profile in the grid.
 2. In the profile tree, right mouse click on the COMPANY NAME or PROFILE DETAILS, select NEW and then LINK INDIVIDUAL.
- or
3. Select PROFILE DETAILS then INDIVIDUALS, right mouse click and select NEW LINK. Note that the INDIVIDUALS option only shows if at least one other individual has already been linked.
 4. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new individual profile via the NEW PROFILE button.
 5. If a new individual profile is created, it will automatically be linked and you will be prompted to assign the individual profile a role and to define if the individual should be the primary contact and/or a mailing contact. If an existing profile is being linked, click the SELECT button and then you will be prompted to assign the individual profile a role, a position, a department and to define if the individual should be the primary contact and/or a mailing contact.



6. Click OK.

How to link an individual profile to a company profile via profile edit

1. Select the company profile and click EDIT PROFILE.
2. Select the LINKED PROFILES tab.
3. Select the NEW LINK button and LINK INDIVIDUAL.
or
4. Select INDIVIDUALS then select the NEW LINK button. Note that the INDIVIDUALS option only shows if at least one other individual has already been linked.
5. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new individual profile via the NEW PROFILE button.
6. If a new profile is created, it will automatically be linked and you will be prompted to assign the individual profile a role and to define if the individual should be the primary contact and/or a mailing contact. If an existing profile is being linked, click the SELECT button and then you will be prompted to assign the individual profile a role, a position, a department and to define if the individual should be the primary contact and/or a mailing contact.

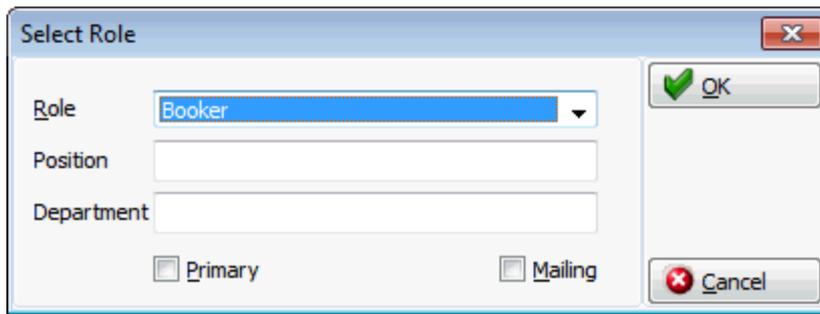


7. Click OK.

Note: If profiles with roles such as booker and decision maker are linked to an individual, they will be sub-grouped by the role.

How to link a company profile to an individual profile via the profile tree

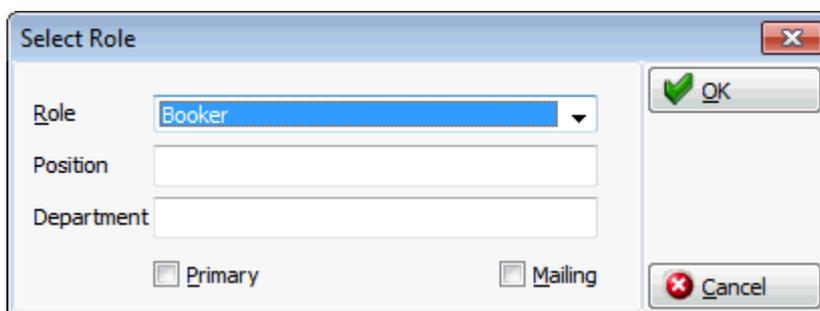
1. Highlight the individual profile in the grid.
2. In the profile tree, right mouse click on the INDIVIDUAL NAME or PROFILE DETAILS, select NEW and then LINK COMPANY.
or
3. Select PROFILE DETAILS then COMPANIES, right mouse click and select NEW LINK. Note that the COMPANIES option only shows if at least one other company has already been linked.
4. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new company profile via the NEW PROFILE button.
5. If a new profile is created, it will automatically be linked and you will be prompted to assign the individual profile a role and to define if the individual should be the primary contact and/or a mailing contact. If an existing profile is being linked, click the SELECT button and then you will be prompted to assign the individual profile a role, a position, a department and to define if the individual should be the primary contact and/or a mailing contact.



6. Click OK.

How to link a company profile to an individual profile via profile edit

1. Select the individual profile and click EDIT PROFILE.
 2. Select the LINKED PROFILES tab.
 3. Select the NEW LINK button and LINK COMPANY.
- or
4. Select COMPANIES then select the NEW LINK button. Note that the COMPANIES option only shows if at least one other company has already been linked.
 5. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new company profile via the NEW PROFILE button.
 6. If a new profile is created, it will automatically be linked and you will be prompted to assign the individual profile a role and to define if the individual should be the primary contact and/or a mailing contact. If an existing profile is being linked, click the SELECT button and then you will be prompted to assign the individual profile a role, a position, a department and to define if the individual should be the primary contact and/or a mailing contact.



7. Click OK.

Linking Individual Profiles to Individual Profiles

Individuals can be linked to more than one other individual profile. If an individual has been linked to one or multiple individual profiles, the linked profiles can be viewed and edited via the tab LINKED PROFILES in the profile edit screen of the individual or in the tree.

How to link an individual profile to another individual profile via the profile tree

1. Highlight the individual profile in the grid.
2. In the profile tree, right mouse click on the INDIVIDUAL NAME or PROFILE DETAILS, select NEW and then LINK INDIVIDUAL.

or

-
3. Select PROFILE DETAILS then INDIVIDUALS, right mouse click and select NEW LINK. Note that the INDIVIDUALS option only shows if at least one other individual has already been linked.
 4. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new individual profile via the NEW PROFILE button.
 5. If a new individual profile is created, it will automatically be linked and you will be prompted to assign the individual profile a role. If an existing profile is being linked, click the SELECT button and then you will be prompted to assign the individual profile a role.

How to link an individual profile to another individual profile via profile edit

1. Select the individual profile and click EDIT PROFILE.
2. Select the LINKED PROFILES tab.
3. Select the NEW LINK button and then select LINK INDIVIDUAL.
or
4. Select INDIVIDUALS then select the NEW LINK button. Note that the INDIVIDUALS option only shows if at least one other individual has already been linked.
5. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new individual profile via the NEW PROFILE button.
6. If a new individual profile is created, it will automatically be linked and you will be prompted to assign the individual profile a role and to define if the individual should be the primary contact and/or a mailing contact. If an existing profile is being linked, click the SELECT button and then you will be prompted to assign the individual profile a role and to define if the individual should be the primary contact and/or a mailing contact.

Note: If profile with roles such as contact or colleague are linked to an individual, they will be sub-grouped by the role.

Linking Family Members

Family members that are related to a profile can be linked. In general only the first line of family members can be linked, i.e. a grandparent or aunt cannot be linked. A grandparent or aunt would need to be linked as a parent or sibling to the mother or fathers profile. An indicator is displayed if one of the family members has additional family members linked.

If family members have been linked, the linked profiles can be viewed and edited via the field FAMILY tab in the profile edit screen of the individual or in the tree.

How to link family members via the profile tree

1. Highlight the individual profile in the grid.
2. In the profile tree, right mouse click on the INDIVIDUAL NAME or PROFILE DETAILS, select NEW and then LINK FAMILY MEMBER.
or
3. Select PROFILE DETAILS then FAMILY MEMBERS, right mouse click and select NEW LINK. Note that the FAMILY MEMBERS option only shows if at least one other family member has already been linked.
4. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new individual profile via the NEW PROFILE button.

5. If a new individual profile is created, it will automatically be linked and you will be prompted to assign the family member a role. If an existing profile is being linked, click the SELECT button and then you will be prompted to assign the family member a role and to define if the family member should get mailings.

How to link family members via profile edit

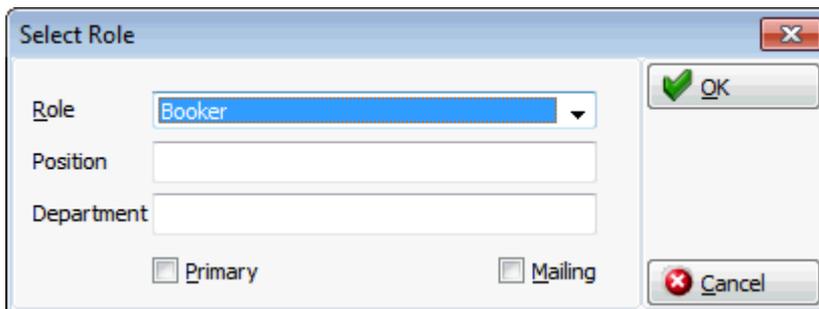
1. Select the individual profile and click EDIT PROFILE.
2. Select the FAMILY tab.
3. Select the LINK button for the role required.
4. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new individual profile via the NEW PROFILE button.
5. If a new individual profile is created, it will automatically be linked to the assigned role. If an existing profile is being linked, click the SELECT button to select the required profile and the profile will be linked to the assigned role.

Linking Company Profiles to Company Profiles

This option offers to represent the structure of companies which are linked on the same level, i.e. the relationship is not that of master and subsidiary.

How to link a company profile to another company profile via the profile tree

1. Highlight the company profile in the grid.
2. In the profile tree, right mouse click on the COMPANY NAME or PROFILE DETAILS, select NEW and then LINK COMPANY.
or
3. Select PROFILE DETAILS then COMPANIES, right mouse click and select NEW LINK. Note that the COMPANIES option only shows if at least one other company has already been linked.
4. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new company profile via the NEW PROFILE button.
5. If a new company profile is created, it will automatically be linked. If an existing profile is being linked, click the SELECT button. You will be prompted to assign the profile a role, a position, a department and to define if the profile is the mailing contact.



6. Click OK.

How to link a company profile to another company profile via profile edit

1. Select the company profile and click EDIT PROFILE.
2. Select the LINKED PROFILES tab.
3. Select the NEW LINK Button and then select LINK COMPANY.
or

4. Select COMPANIES then select the NEW LINK button. Note that the COMPANIES option only shows if at least one other company has already been linked.
5. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new company profile via the NEW PROFILE button.
6. If a new company profile is created, it will automatically be linked. If an existing profile is being linked, click the SELECT button. You will be prompted to assign the profile a role, a position, a department and to define if the profile is the mailing contact.

7. Click OK.

Note: If different company types such as company and travel agent are linked to a company, they will be sub-grouped by the profile type.

Link Sub-Company

This option offers to represent the structure of large corporations that are structured by master and subsidiaries.

If a company has been linked as a subsidiary to another company an 'S' will be displayed in the profile grid next to the company name and the profile edit screen will show the master company (Subsidiary of). An 'M' next to the company name in the profile grid indicates that it is a master, in other words it has existing subsidiaries and the profile edit screen will show the subsidiaries (Master of).

How to link a sub-company profile to another company profile via the profile tree

1. Highlight the master company profile in the grid.
 2. In the profile tree, right mouse click on the COMPANY NAME or PROFILE DETAILS, select NEW and then LINK SUB COMPANY.
- or
3. Select PROFILE DETAILS then SUB COMPANIES, right mouse click and select NEW SUB COMPANY LINK. Note that the SUB COMPANIES option only shows if at least one other sub-company has already been linked.
 4. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new company profile via the NEW PROFILE button.
 5. If a new company profile is created, it will automatically be linked. If an existing profile is being linked, click the SELECT button.

How to link a sub-company profile to another company profile via profile edit

1. Select the master company profile and click EDIT PROFILE.
2. Select the LINKED PROFILES tab.
3. Select the NEW LINK Button and then select LINK SUB COMPANY.

or

4. Select SUB COMPANIES, then select the NEW LINK button. Note that the SUB COMPANIES option only shows if at least one other sub-company has already been linked.
5. Use the search criteria provided by the profile search screen to find the profile you want to link or create a new company profile via the NEW PROFILE button.
6. If a new company profile is created, it will automatically be linked. If an existing profile is being linked, click the SELECT button.

Note: If different company types such as company and travel agent are linked to a company, they will be sub-grouped by the profile type.

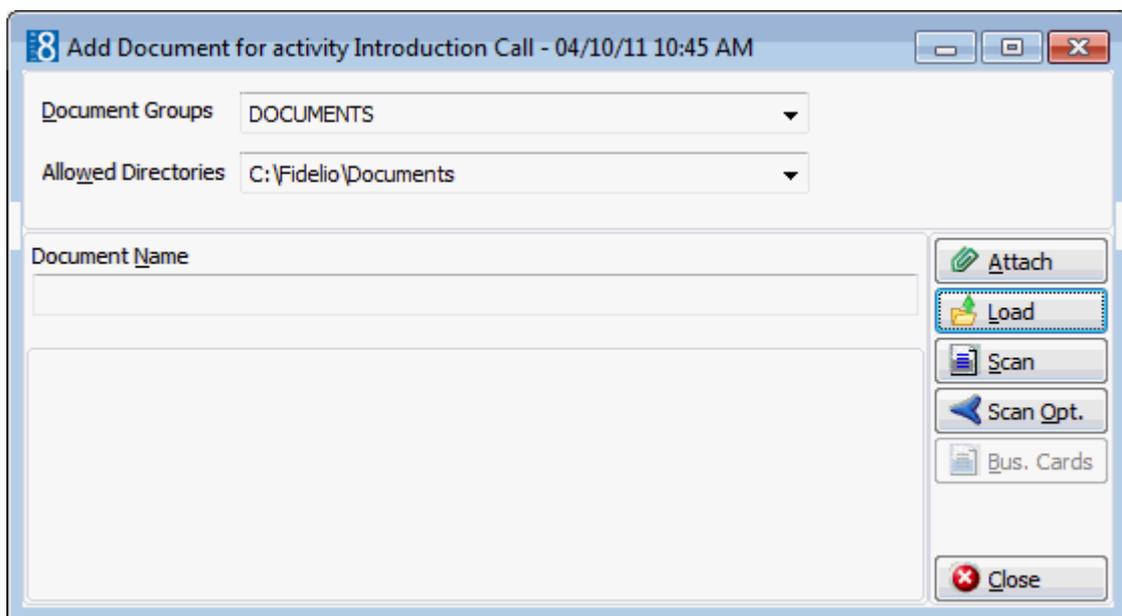
Linked Documents

This option enables the user to view, edit or add different types of documents to a profile, task or activity. It is recommended to place these documents on a shared network path to which all users have access. If a scanner is connected to the workstation you can also scan and attach documents such as contracts, letters or pictures. The scanner needs to be 'Twain' compatible.

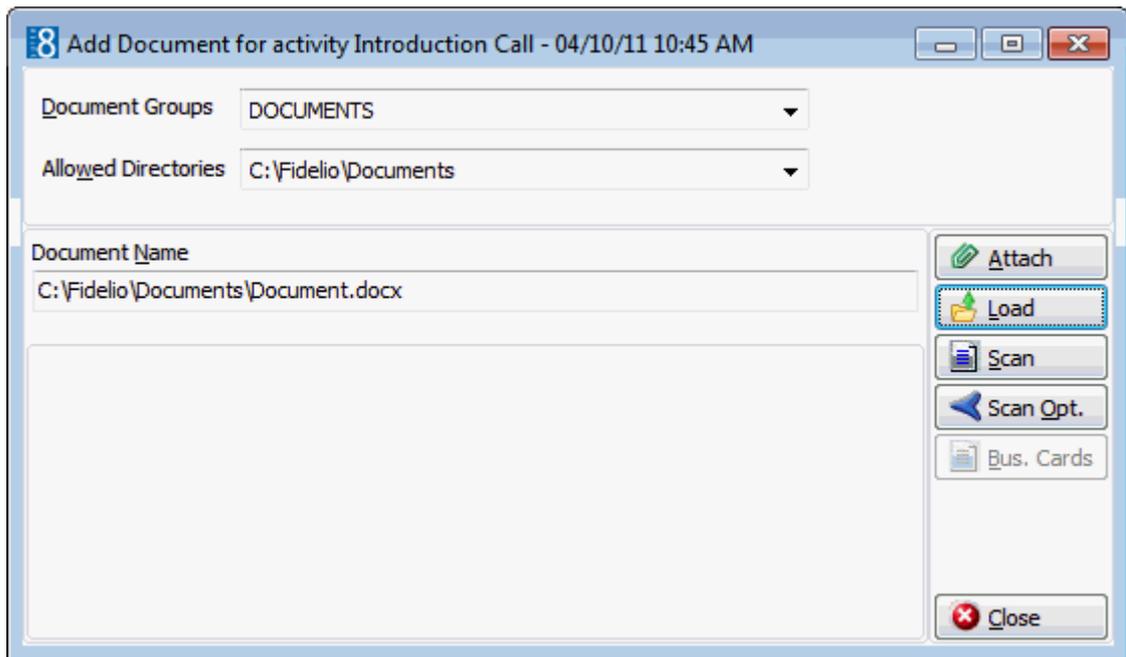
Note: The linked documents dialog box may be viewed from various access points, access is via the linked documents tab or via the options button, if available.

How to link a document

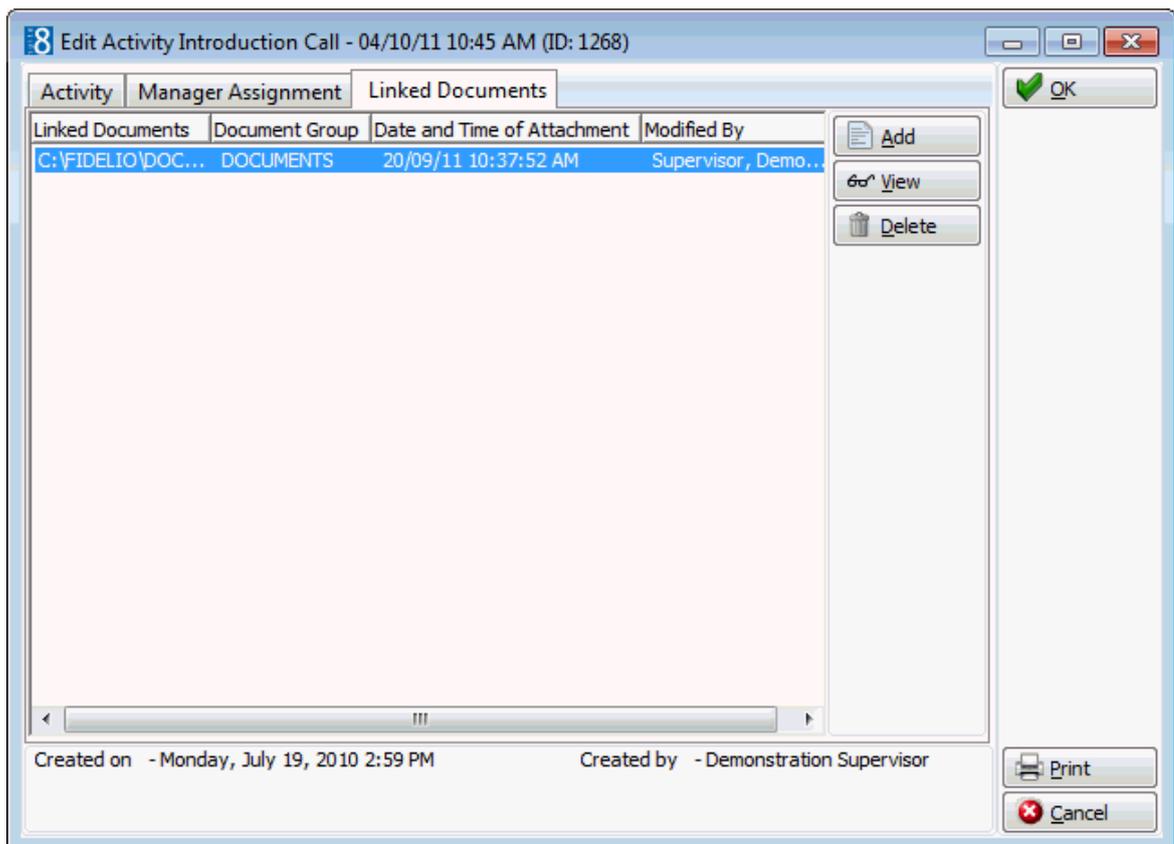
1. Select the LINKED DOCUMENTS tab.
2. Click ADD, the Attach documents dialog box is displayed.



3. In the DOCUMENT GROUPS list, select the document group required.
4. In the ALLOWED DIRECTORIES list, select the allowed directory required.
5. Click LOAD to display the list of documents.
6. Select the required document and click OPEN, the Document Name field is filled.



- To attach the document, click ATTACH, the document is shown as linked on the linked documents tab.



Note: Pictures or images may be attached in JPG or BMP format. The default setting is JPG, but this may be changed via the OPTIONS button. The selected settings will be saved for that user.

How to view/edit a linked document

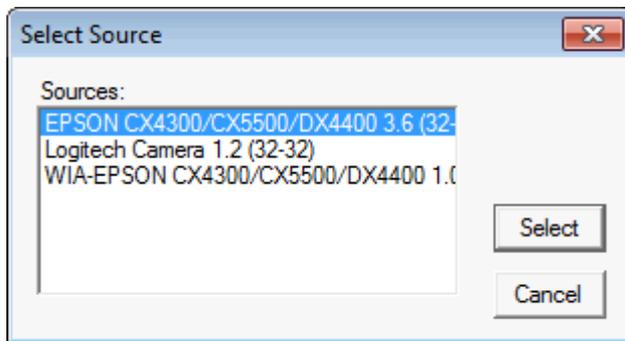
1. Select the LINKED DOCUMENTS tab.
2. Select the document and click VIEW.

Suite8 opens the relevant application, for example, Word if the document is a Word document.

Note: The document may be edited directly from within the opened application.

How to scan and link a document

1. Select the LINKED DOCUMENTS tab.
2. Click ADD, the attach documents dialog box is displayed.
3. In the DOCUMENT GROUPS list, click the document group required.
4. In the ALLOWED DIRECTORIES list, click the allowed directory required.
5. Click SCAN, the select source dialog box is displayed.



6. Select the source and click SELECT to open the scanner application.
7. Scan the document.
8. Click ATTACH to link the scanned document.

 Document groups and path are defined via the option DOCUMENT TYPES under Setup → Configuration → Miscellaneous.

 Adding or editing documents on the linked documents tab is controlled by the user right LINKED DOCUMENTS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Attach documents.

Family Wizard

This option is used to enter family members and contacts that are related to a profile. In general only the first line of family members can be linked, i.e. a grandparent or aunt cannot be linked. A grandparent or aunt would need to be linked as a parent or sibling to the mothers or fathers profile. An indicator is displayed if one of the family members has additional family members linked. Address and communication information can be copied. Family members are displayed on the profile tree under Profile Details → Family Members.

Options available on the family tab:

Mansfield	Stella	24	Feb	1969	<input type="checkbox"/> Hide	Link	Unlink
					<input type="checkbox"/> Family Mailing	Edit	+
					<input checked="" type="checkbox"/> Copy Fam. Info		

- A new family member profile can be created by entering the family member's name.

- The default setting of the HIDE check box is dependant upon the setting in configuration. Hidden family members can be displayed on the profile search screen by selecting the option SHOW FAMILY MEMBERS.
- Select the FAMILY MAILING check box if this family member should be defined as a mailing contact. Family members which are not defined as a family mailing contact can be excluded when running mailing queries.
- Select the COPY FAM. INFO check box to copy the existing family name, family letter and address greeting information. This option is selected by default, but can be cleared if required; the selected setting remains until changed again.
- Click the LINK button to link existing or create new family members; the profile search screen for individual profiles is displayed. (Active only where no profile is already linked.)
- Click the UNLINK button to remove the link to the profile (Active only for existing family member profiles).
- Click the EDIT button to edit the linked profile (Active only for existing family member profiles).
- Click the + button to add a family member with the same role.
- Click the SHOW INACTIVE check box to list linked family members whose profile is marked as not active. Inactive family members are indicated by an asterisk (*).
- The option FAMILY MAILING CONTACT on the main profile is selected by default if no other family member is selected as the Family Mailing Contact.
- When changing the profile status from active to inactive for a family profile marked as the mailing contact and with linked family members marked as hidden, the system prompts the user to selected another family member as the mailing contact

Statistic Report

The Statistics tab stores statistical information such as the number of stays, number of nights and displays the revenue for the selected profile in cube report format. Click on the STATISTICS tab to display the Statistics screen.

How to activate the Statistic report tab

1. Create a new report section under MISCELLANEOUS → REPORTS.
2. Select the Section Role PROFILE STATISTIC and for the Source Type select OLAP CUBE. Standard cube reports have been created called:
PROFILESTATSCOMPANY01.XML for the company statistics and
PROFILESTATSINDIVIDUAL01.XML for the individual profile statistics.
3. Create two new reports using the standard cube reports supplied; see Report Setup in the Miscellaneous Manual.
4. Under Configuration → Global Settings → Reports tab select the Individual profile statistic cube report and the Company profile statistic report from the drop down list.

On the profile edit dialog screen an additional tab called STATISTICAL REPORT is displayed, showing the statistical information for the selected profile.

Note: If new cube reports are created the individual profile cube should use the parameter GUESTID and the company profile cube the parameter COMPANYID.

Editing a Profile

An existing profile can be edited in one of the following ways:

- In the profile grid, highlight with the cursor and select the EDIT PROFILE button.
- In the profile grid, highlight with the cursor and double click.
- Via the profile tree, highlight Profile details, right mouse click and select EDIT.

Several additional READ-ONLY details may be displayed when editing a profile.

This field	Displays this information
Name	The full name of the guest.
Related To	Displayed only if the profile is linked to another individual profile or family member.
Linked To	Displayed only if the profile is linked to company profile.

Adding a New Address/Communication

A new address or communication method can be added in one of the following ways:

- From within the profile screen.
- Via the profile tree, highlight Profile details, right mouse click and select NEW ADDRESS or COMMUNICATION.
- Via the profile tree, expand Profile Details and select the sub-section ADDRESS or COMMUNICATIONS and NEW.

Potential Duplicates

See “Potential Duplicates” page 132

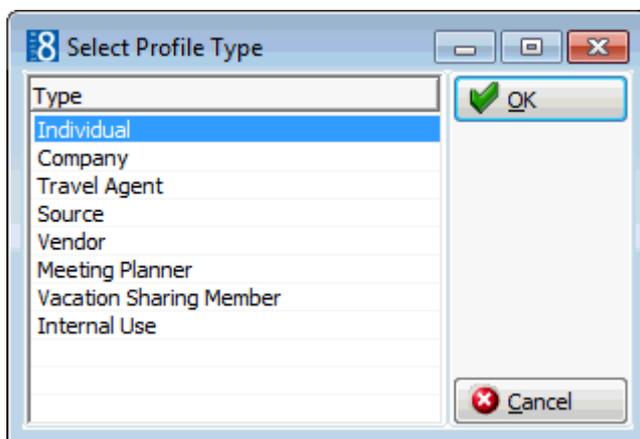
Company Profile

New Company profile

There are two distinct types of profile screens, one for individuals and a second one for all other profile types. The company, agent, meeting planner, vendor and source profile screens are for the most part identical. For the purposes of clarity we will refer to all of the above types of profiles as company profiles in the documentation.

To create a new company profile

1. On the profile search screen click the NEW PROFILE button.
2. The Select Type dialog box is displayed, select the profile type required, for an individual profile select COMPANY and click OK.



Note: The types of profiles available are dependant upon what has been configured by your property.

3. The profile screen appears displaying NEW COMPANY PROFILE and the profile ID number on the title bar at the top of the screen.

The profile screen for all the profile categories consist of several screens, each one represented by a tab, for an explanation of each tab see the Profile Tabs table below.

4. The PROFILE tab is displayed by default. On this screen the field FULL NAME is in bold letters, this indicates that it is a mandatory field. All other fields are optional.
5. Fill the optional fields by typing information or selecting information from the drop-down lists. Several fields, namely address, communications and company card info allow multiple entries of data therefore when entering data here a separate screen is displayed and an entry may be added, edited or deleted.
6. For an explanation of the fields on the profile screen, see the tables below:

Profile Tabs

Profile Tab	Details
Profile	A record of the main information about an individual guest, company, travel agent, vendor, meeting planner or source profile.
More Fields	A continuation of the profile screen with additional information.
Notes	An unlimited number of notes can be attached to each profile.
Marketing	On this tab marketing information for both pre-defined categories and customized categories is stored.
Linked Profiles	On this tab new links to other profiles are made, and existing links can be viewed, edited or deleted.
Linked Documents	On this tab documents can be added to, and already attached documents can be viewed or removed from the profile.
Statistic Report	On this tab statistical information such as the number of stays, number of nights and the revenue is shown for the selected profile.

Name and Address Information

Fill in this field	With this information
Search Name	When the record is saved the search name field is filled automatically based on the full name field. The search name can also be overwritten, but it is recommended only if the company is known under an abbreviation such as IBM, BMW.
Full Name (mandatory)	The full name of the company. The way a name is entered in the profile screen is the way it will appear in letters and folios. As searches are not case-sensitive, they will not be affected by capitalization.
Division	The company division.
Address	<p>An unlimited number of addresses can be entered per profile. Two counters display the total number of addresses for this guest and the total per the selected address type.</p> <p>One of the entered addresses must be defined as primary address.</p> <p>Click the NEW button to enter a new address.</p> <p>Click the EDIT button to edit an existing address.</p> <p>Click the DELETE ADDR button to delete an existing address.</p>
Type	Select the address type from the drop-down list.
Primary	Check this box for the address type that is the primary address type. By default the first address entered is marked as the primary address.
Country	Select the country code from the drop-down list.
Zip	Enter here the zip code or postal code.

City	Select the city from the drop-down list or enter the city name (max 60 characters).
State	Enter the state code here.
Street 1	Address line 1
Street 2	Address line 2
Street 3	Address line 3

 The address format for both display and printing is defined for each country via the option Countries under Setup → Configuration → CRM.

Communication Information

Fill in this field	With this information
Communication	An unlimited number of communications can be linked to each profile. Click the NEW button to enter a new communication type. Click the EDIT button to edit an existing communication type. Click the DELETE COMM button to delete an existing communication.
Type	Select the communication type from the drop-down list.
Value	Enter the value for the communication type, e.g. telephone number, email address, web pages, etc Note: If a connection to the Internet exists, emails can be send directly from within V8 (MS Outlook).
Primary	Check this box for the communication type that is the primary communication method. By default the first communication entered for each type of communication, is marked as the primary communication. This can be changed as required.

Other Information

Fill in this field	With this information
Active	By default this checkbox is marked indicating that the profile is active. Clear this checkbox to mark the profile as inactive and enter a date and a reason for placing the profile as inactive. Profiles with active tasks & activities, reservations, bookings, or financial accounts cannot be set to inactive.
Sales Manager	If the properties account manager for this account is known select from the drop-down list, otherwise leave blank.
Display	Select the CCM radio button if this profile is a CCM only profile. Select the FO radio button if it is a FO only profile. The default is that the profile will be displayed in all modules.
No. of employees	Enter here the number of company employees. This is for information purposes only.
Rev. Potential Rooms	The potential revenue for room sales. This is for information purposes only.

Rev. Potential Catering	The potential revenue for catering sales. This is for information purposes only.
Preferred Currency	The entry in this field, to be chosen from a drop-down list of currency codes, indicates the preferred currency. Information purposes only.
Room Features	A drop-down list with room features: smoking or non-smoking rooms, preferred floor, near to the elevator, etc. The drop-down list is user-definable. When you block the guest's room or check the guest in, the system searches only for rooms with these features.
Credit Status	C - Cash Only Indicates that this profile can be accepted on cash-only basis. A warning message will be displayed when making a new booking or reservation with this profile. A reason for the cash list rating can be entered. R - Restricted Indicates that this profile has been placed on a restricted list. This usually indicates that the hotel does not wish to accept reservations or bookings with this profile. A warning message will be displayed when making a new booking or reservation. A reason for the restricted rating can be entered. A - Accounts Receivable Indicates that this profile has been given approval for city ledger billing. A reason for city ledger approval can be entered.
Simple Commission	Only used by properties not operating the Travel Agent Processing Module. If it is a travel agent or source profile the default commission can be entered. This is usually a code indicating the % of commission payable. This field can then be used on a simple commission report.
Language	Select the language from the drop-down list. Company and agent correspondence including city ledger bills will be printed in the language chosen.

Company Card Information

Fill in this field	With this information
Company Card Info	Click the NEW button to enter a new company card. Click the EDIT button to edit an existing company card. Click the DELETE CARD button to delete a company card.
Company / Credit	Selecting one or other radio button will change the screen entry from company card to credit card.
Type	Select the company card type from the drop-down list. Options available depend on what the property has configured. IATA number is only valid for travel agent profiles. When selecting the membership type A/R the A/R Accounts Navigator screen is displayed.
Number	Enter the company card number.
Expiry (MM/YY)	The expiry date of the company card. This option is displayed only if the expiry check is activated in membership type configuration.
Start Date	Start date of the block contract.

	Required only for a company card defined with the role CONTRACT NUMBER.
End Date	End date of the block contract. Required only for a company card defined with the role CONTRACT NUMBER.
Sign Up Date	Sign-up date of the block contract. Required only for a company card defined with the role CONTRACT NUMBER.
Credit Card	Click the NEW button to enter a new credit card. Click the EDIT button to edit an existing credit card. Click the DELETE CARD button to delete an existing credit card.
Card Type	Select the credit card type from the drop-down list.
Card Number	The credit card number.
Expiry (MM/YY)	The expiry date of the credit card.
Holder's Name	Name on the credit card.

Note: VAT numbers for Belgium have to be 10 digits; the validation routing is activated only if the profile has an address with country code BE for Belgium.

-  The main profile tab is controlled by the user right PROFILE DETAILS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles. If both the VIEW and EDIT rights are enabled then the fields are accessible and all other rights applicable to the screen are taken into consideration. If the EDIT right is denied then the fields on the main profile tab are view only.
-  Each profile tab is controlled by its own user right under PROFILE TABS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles. If the EDIT right is enabled then the fields are accessible and all other rights applicable to that screen are taken into consideration. If the EDIT right is denied then the fields on that tab are view only.
-  The default language for profiles is defined via the option DEFAULT LANGUAGE FOR PROFILES under Setup → Configuration → Global Settings → Profile → Profile 1 tab.
-  The creation, editing and deletion of AR Account Numbers is controlled by the user rights under A/R ACCOUNT NUMBER under Setup → Configuration → Users → User Definition → Rights → Customer Profile.
-  The expiry date for company cards is displayed only if the expiry check option is selected when defining the MEMBERSHIP TYPES under Setup → Configuration → CRM.

Company Profile More Fields Tab

The More Fields tab stores additional information, such as billing instructions, market segment and rate code information.

Click on the MORE FIELDS tab to display the More Fields screen.

The screenshot shows a software window titled "New Company Profile (ID: 2650)". It has several tabs: "Profile", "More Fields" (which is active), "Notes", "Marketing", "Linked Profiles", "Linked Documents", "Linked Pictures", and "Statistic Report".

Under the "More Fields" tab, there are the following elements:

- Two checkboxes: "No Mailing" and "No E-Mailing".
- A checked checkbox: "Save Profile".
- A dropdown menu for "Market Segment" and a text input field for "Rebate Code" with a browse button (...).
- A text input field for "Billing Instructions" with a browse button (...).
- A text input field for "Rate Codes" with a browse button (...).

At the bottom of the window, it displays "Creating at - Monday, September 26, 2011 2:51 PM" and "Creating by - Supervisor Demonstration". There is also a "Notes : 0" label and three buttons: "Corresp." (with a printer icon), "OK" (with a green checkmark), and "Cancel" (with a red X).

More Fields Information

Fill in this field	With this information
No Mailing	Select this option if no mailings should be sent to this profile.
No E-Mailing	Select this option if no email should be sent to this profile.
Save Profile	This checkbox is selected by default and ensures that profiles will not be set to inactive during night audit after the time period defined in configuration.
Market Segment	Defines which market segments are valid for this profile.
Rebate Code	Used to assign a rebate code.

	This option is only displayed if the parameter ENABLE REBATE LINK is active.
Billing Instructions	If the company has default billing instructions, these should be entered here. The billing instructions are then suggested every time you enter a billing instruction in the reservation.
Rate Codes	If the company has a special rate code, enter it here. This rate code is then suggested every time the company name is entered on the Rate Query (Ctrl + R) or when entering a new reservation. See: Rate Linkage
TAP currency	The Travel Agent Processing Currency code for paying agent commission. Select from drop-down list the currency that should be used to pay commission. Note: This option is only displayed on a travel agent or source profile and not on a company profile.
TAP code	The default commission code that should be used to calculate commissions for reservations made by the agent or source. Select from drop-down list the defined commission codes. Note: This option is only displayed on a travel agent or source profile and not on a company profile.

Transponder Standard Arrangements

Fill in this field	With this information
Transponder Standard Arrangements	Click the NEW button to link a new standard Bus/Group template. Click the EDIT button to edit a standard Bus/Group template. Click the DELETE button to remove a linked template. Accelerator keys are indicated with (1) for New (Alt + 1), (2) for Edit (Alt + 2) and (3) for Delete (Alt + 3).
Code	The code assigned to the selected bus/group template.
Name	The description of the bus/group template.
Default	Indicates which bus/group template is the default.

-  Access to the More Fields tab is controlled by the user right MORE FIELDS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Profile Tabs. If the EDIT right is enabled then the fields are accessible and all other rights applicable to that screen are taken into consideration. If the EDIT right is denied then the fields on that tab are view only.
-  The creation and deletion of VIP Codes is controlled by the user rights under VIP VIP CODES under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Marketing Information.
-  Transponder handling functionality is controlled by the parameter TRANSPONDER HANDLING under Setup → Configuration → Global Settings → Generic2 tab.
-  The linking of a rebate code at profile level is controlled by the parameter ENABLE REBATE LINK under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

Profile Notes Tab

See "Profile Notes" page 46

Company Profile Marketing Tab

The marketing tab stores a variety of marketing information about the profile, all of which are user definable. Each standard marketing category can be selected or not, according to the properties needs, for example, newspaper is not meaningful for company profiles and primary sales territory is not useful for a hotel with no regional sales office. Several standard marketing categories are available along with the possibility to define customized categories as required.

Click on the MARKETING tab to display the Marketing screen.

New Company Profile (ID: 2650)

Profile More Fields Notes Marketing Linked Profiles Linked Documents Linked Pictures Statistic Report

Default Attributes

Priority		Mailing Codes	
Industry Codes		Action Codes	
Competition Codes		Newspapers	
Scope		Specials	
Scope City		Source	
Potential		Sales Territory	
Pref. Distribution		Primary Sales Office	
Product Interest			

Defined Attributes

Managers

Primary	Name	Initials	Title/Role

Creating at - Monday, September 26, 2011 2:51 PM Creating by - Supervisor Demonstration

Notes : 0 Corresp. OK Cancel

Note: If a user does not have the right to enter or delete an attribute, the selection box for the attributes is greyed out.

Company Marketing Tab

Fill in this field	With this information
Default Attributes	
Priority	Defines the priority of the company within the hotel.
Industry Codes	Defines in which industry the company operates
Competition Codes	If the customer also books at your competitors
Scope	Scope: defines if the company operates local, regional, national etc.
Scope City	This further defines the scope. If scope national was selected, the cities can be selected here.
Potential	Can be used to define the potential of a customer in for example, groups, individual reservations and conference bookings.
Pref. Distribution	Defines how the customer wants to receive correspondence. Select the method of preferred distribution such as letter, email or fax from the drop-down list. This is displayed when printing letter but is for information purposes only.
Product Interest	Defines which products the customer is interested in - conferences, golf, weekend specials, etc.
Action Codes	Action Code: defines what action the hotel wants to take i.e. Christmas present, regular invitations etc.
Mailing Codes	Defines which mailings the customer should receive.
Newspapers	Defines which newspapers the customer should receive
Specials	Defines any specials that were configured
Source	Defines the origin of the profile
Sales Territory	May be used if sales managers work in territories. In that case it can be defined in which sales territory the customer falls into.
Primary Sales Office	If the hotel belongs to a chain or partnership the office can be defined and selected here.
Defined Attributes	Reserved for attributes defined by the individual property. In configuration the property can create new list box fields and define where they should be displayed.
Managers	Defines the managers for this account. The primary account manager is assigned via the SALES MANAGER field on the profile edit screen; however additional managers can be assigned here.

 The marketing tab is not displayed if the parameter HIDE MARKETING TAB is selected under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

-  Access to the Marketing tab is controlled by the user right `MARKETING` under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Profile Tabs. If the `EDIT` right is enabled then the fields are accessible and all other rights applicable to Marketing screen are taken into consideration. If the `EDIT` right is denied then the fields are view only. This user right takes higher priority over the marketing category user rights.
-  Each marketing category has its own user rights. Inserting and deleting marketing categories are controlled by the user rights `INSERT AND DELETE` under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Marketing Information. When both rights are denied the drop-down box cannot be opened. With `INSERT` enabled and `DELETE` denied, new codes can be added but existing codes cannot be deleted. With `INSERT` denied and `DELETE` enabled, existing codes can be deleted but new codes cannot be added.
-  Attribute categories are defined via the option `ATTRIBUTE CATEGORIES` under Setup → Configuration → CRM. For each attribute category added a new category is created under `MARKETING INFO`. The elements for each new list box may then be added under the corresponding `MARKETING INFO` category under Setup → Configuration → CRM.

Linked Profiles Tab

See "Linked Profiles" page 54

Linked Documents Tab

See "Linked Documents" page 61

Editing a Company Profile

An existing profile can be edited in one of the following ways:

- In the profile grid, highlight with the cursor and select the `EDIT PROFILE` button.
- In the profile grid, highlight with the cursor and double click.
- Via the profile tree, highlight Profile details, right mouse click and select `EDIT`.

Several additional `READ-ONLY` details may be displayed when editing a profile.

This field	Displays this information
Name	The full name of the company.
Master of	Displayed only if the profile is linked to a sub-company.
Subsidiary of	Displayed only if the profile is linked to a master company.
Linked Companies	Displayed only if the profile is linked to another company profile.
Linked Individuals	Displayed only if the profile is linked to an individual profile.

Adding a New Address/Communication

A new address or communication method can be added in one of the following ways:

- From within the profile screen.
- Via the profile tree, highlight Profile details, right mouse click and select `NEW ADDRESS` or `COMMUNICATION`.
- Via the profile tree, expand Profile Details and select the sub-section `ADDRESS` or `COMMUNICATIONS` and `NEW`.

Potential Duplicates

See "Potential Duplicates" page 132

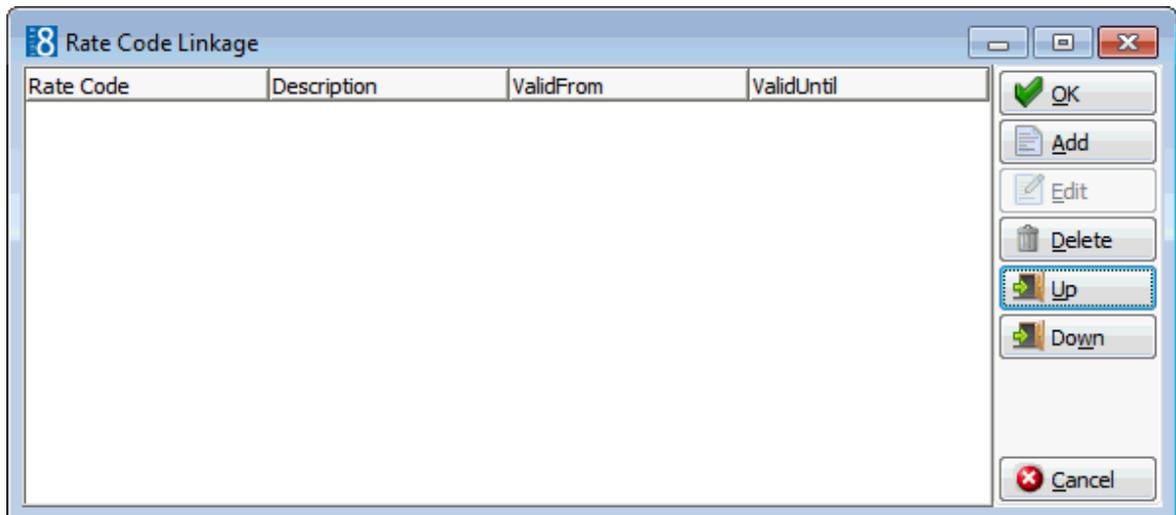
Rate Linkage

Your hotel may have an agreement with a guest, company or agent to charge them a specific rate. To ensure that they receive this rate every time they make a reservation, Suite8 allows you to link specific rate codes to a profile. The rate code is then suggested every time you enter this profile name on the Rate Query (Ctrl + R) or when entering a new reservation.

Rate linkage validity dates allow for special promotional rates to be linked for a specific period. For example, a profile has two rate codes linked; Rate Code 'A' valid from 01.10.07 to 15.10.07 and Rate Code 'B' valid from 16.10.07 to 31.12.07, when a reservation is made using this profile on 16.10.07 then rate code 'B' will be entered in the rate code field. In addition to the general valid dates the period can be changed for each profile, for example, rate code 'B' for the selected profile can be set to be valid only until 31.10.2007.

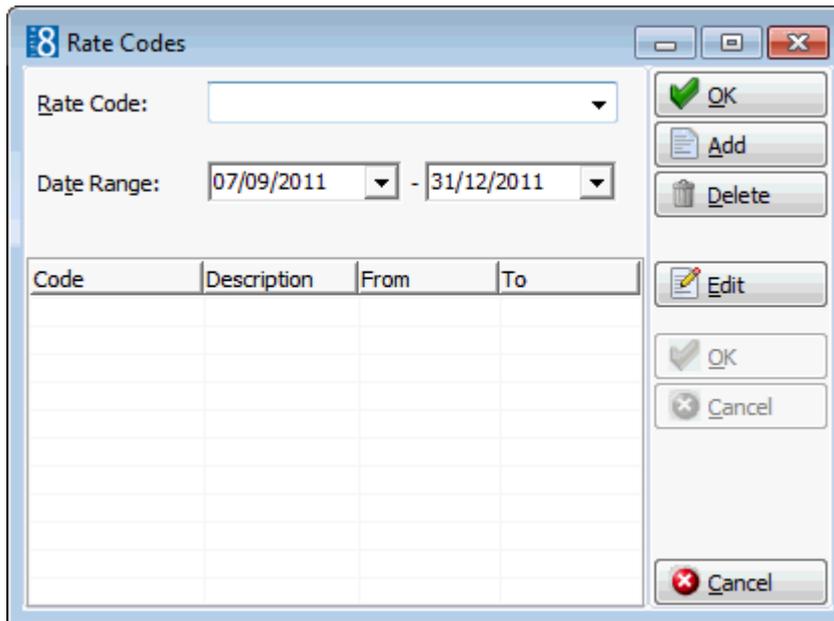
How to link a rate code to a profile

1. Click the CUSTOMER RELATIONS menu and select PROFILES or right-click on PROFILE DETAILS in the profile tree and select EDIT, to display the Customer Profiles screen.
2. Search for and select the profile required, click EDIT PROFILE.
3. The edit profile screen is displayed, click the MORE FIELDS tab.
4. Click the selection button on the RATE CODE field, the Rate Code Linkage dialog box is displayed.



Note: If the profile is linked to any rate codes, the name and description of the rate codes are listed.

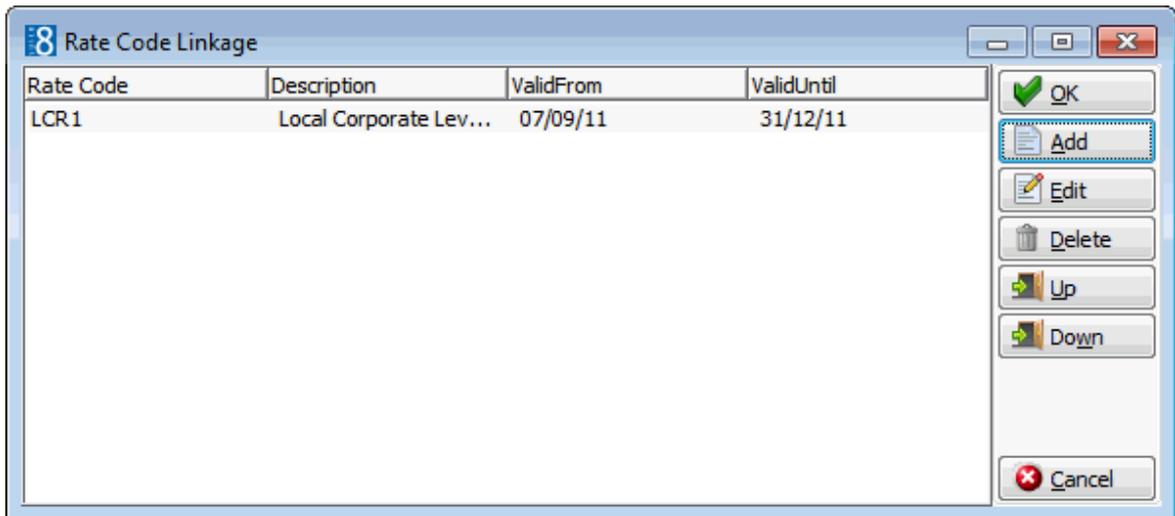
5. Click ADD to link a new rate code to the profile, the Rate Codes dialog box is displayed.



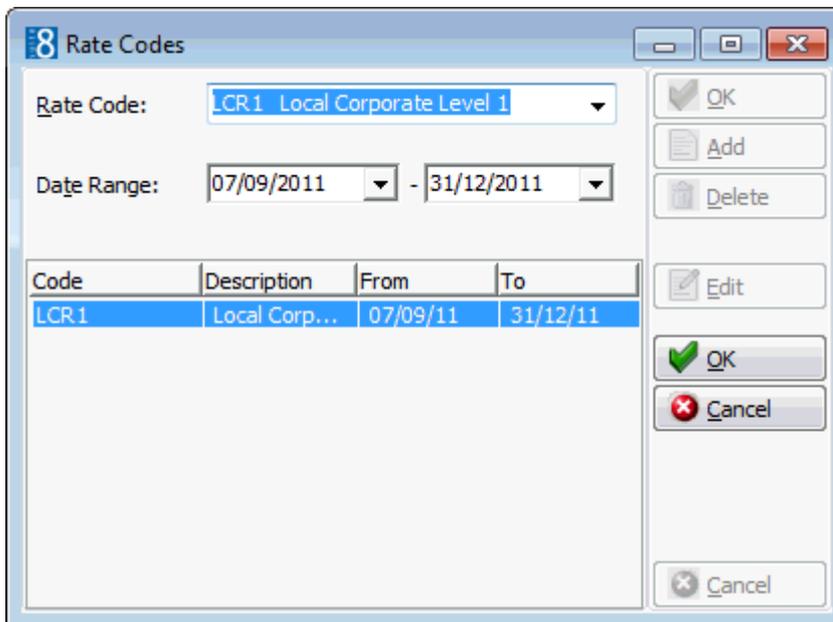
6. In the RATE CODE box click the drop-down arrow, and select the rate code.
7. Enter the dates for which the linked rate code is valid in the DATE RANGE boxes.
8. Click the ADD button to add the selected rate code to the list.
9. Repeat steps 6, 7 and 8 for all the required rate codes.
10. Click OK to close the Rate Codes dialog box.
11. The selected rate codes are displayed in the Rate Linkage dialog box.
12. Use the up and down arrows to adjust the display order. When entering a reservation the rates will be displayed in the order defined here.
13. Click OK to close the Rate Linkage dialog box, the selected rate codes are displayed in the RATE CODE box.
14. Click OK to close the profile edit screen.

How to edit a rate code linked to a profile

1. Search for and select the profile required, click EDIT PROFILE.
2. The edit profile screen is displayed, click the MORE FIELDS tab.
3. Click the selection button on the RATE CODE field, the Rate Code Linkage dialog box is displayed.



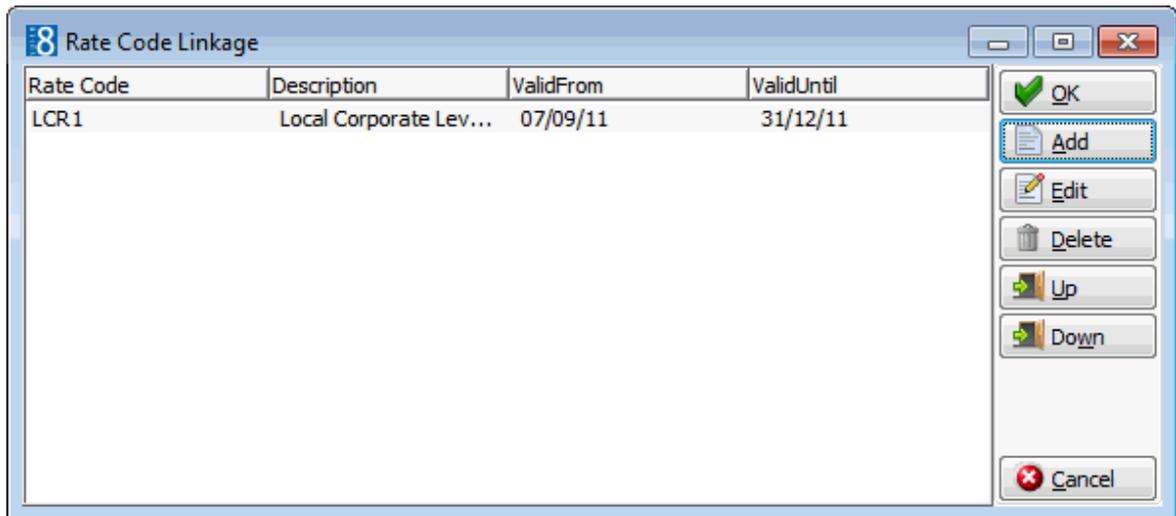
4. Select the rate code to be edited and click EDIT, the rate codes dialog box is displayed with the fields RATE CODE and DATE RANGE active.



5. Make the necessary changes and click OK to accept the changes.
6. Click OK to close the rate codes dialog box.
7. Click OK to close the Rate Linkages dialog box.
8. Click OK to close the profile edit screen.

How to delete a rate code linked to a profile

1. Search for and select the profile required, click EDIT PROFILE.
2. The edit profile screen is displayed, click the MORE FIELDS tab.
3. Click the selection button on the RATE CODE field, the Rate Code Linkage dialog box is displayed.



4. Select the rate code to be deleted and click DELETE, the rate code is deleted.
5. Click OK to close the Rate Linkage dialog box.
6. Click OK to close the profile edit screen.

Correspondence

The CORRESPONDENCE option may be used to send letters, faxes, SMS's or emails to a selected profile from within the Customer Relationship Management module.

This option is available on the customer profiles navigator screen and the edit profiles dialog screen.

Profile letters can be printed and sent via regular mail or sent via email, as an email attachment or by fax. Profile letters which are sent to a linked contact profile will be shown on both the contact profile and the linked profile.

With the easy letter option users can quickly and easily create letters based on pre-defined text blocks. A profile and address can be selected and one or more text blocks placed in a desired sequence to quickly create a letter.

The correspondence option opens the print dialog window. The screen is split into three sections.

- The first section is to choose a template from a list of predefined TEMPLATES and to select a language for the correspondence. Letter and form templates can be created in Miscellaneous → Reports with the section role PROFILE LETTERS.
- The second section is the profiles CATEGORY section and contains information about the selected profile. The DETAILS section displays all the addresses from all the linked profiles. The primary address of the selected profile and one communication type is selected. If there are several profiles attached, you can select which profile the letter should be sent to. Both the profile and any linked profiles can be edited by pressing the EDIT PROFILE button.

If the correspondence is opened from a company profile all linked individuals are displayed and the primary contact is selected by default and if opened from the individual profile all linked companies are displayed.

- The third section gives information about the HISTORY of sent correspondence for this profile. The template name and the print date are displayed. If a letter was edited and saved but not printed then the template name will be displayed with (Saved) after the name and the date and time it was saved.

 Correspondence functionality is controlled by the user right CORRESPONDENCE under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Profile Details.

-  Default email subjects can be defined via the option DEFAULT EMAIL SUBJECTS under Setup → Configuration → Miscellaneous → Simple Custom Text.
-  Default email body text can be defined via the option EMAIL BODY DEFAULT under Setup → Configuration → Miscellaneous → Simple Custom Text.
-  The maximum size for email attachments is defined via the option MAX. EMAIL ATTACHMENT SIZE (MB) under Setup → Configuration → Global Settings → Reports → Reports tab.
-  Family functionality is controlled by the parameter ENABLE FAMILY WIZARD under Setup → Configuration → Global Settings → Profile → Profile 1 tab.
-  SMS Sending functionality is controlled by the parameter ENABLE SMS SENDING under Setup → Configuration → Global Settings → Interfaces → Misc. Interface 4 tab.
-  SMS sending requires that an SMS template with the section role PROFILE LETTER be created under Miscellaneous → Reports. Using the Internal Editor functionality up to 160 characters can be added to the template.

How to print correspondence

1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.

2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box the language of the selected individual profile is selected by default, this can be changes as required. If no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.

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5. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
 6. Creating correspondence for an individual profile requires that only the ADDRESS be selected as the profile is selected by default. When creating correspondence for a company profile, the primary CONTACT and primary ADDRESS of the company is selected by default, but can be changed as required.
 7. Click EDIT, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
 8. Make sure that all the entered information is correct; any necessary changes can be made at this time.
 9. At this point the letter can be printed or saved to be printed at a later time.
 10. To print the letter, click the PRINT icon or select PRINT from the file menu.
 11. Close the edit screen, if changes were made you will be prompted to save the changes.
 12. If using MS Word as the editor, click EXIT to close the application.
 13. If the document was edited and saved but not yet printed then the template name will be displayed with (Saved) after the name and the date and time it was saved in the history section of the Print dialog box.
 14. If the document was printed then the template name will be displayed and the date and time it was printed in the history section of the Print dialog box.

How to print saved correspondence

1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. Select the document to be printed from the list of templates in the HISTORY section of the screen.
3. Click EDIT HISTORY, the letter is displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
4. Make sure that all the entered information is correct; any necessary changes can be made at this time.
5. Click the PRINT icon or select PRINT from the file menu to print the letter.
6. Close the edit screen.
7. If using MS Word as the editor, click EXIT to close the application.
8. The document template name will be displayed and the date and time it was printed in the HISTORY section of the Print dialog box.

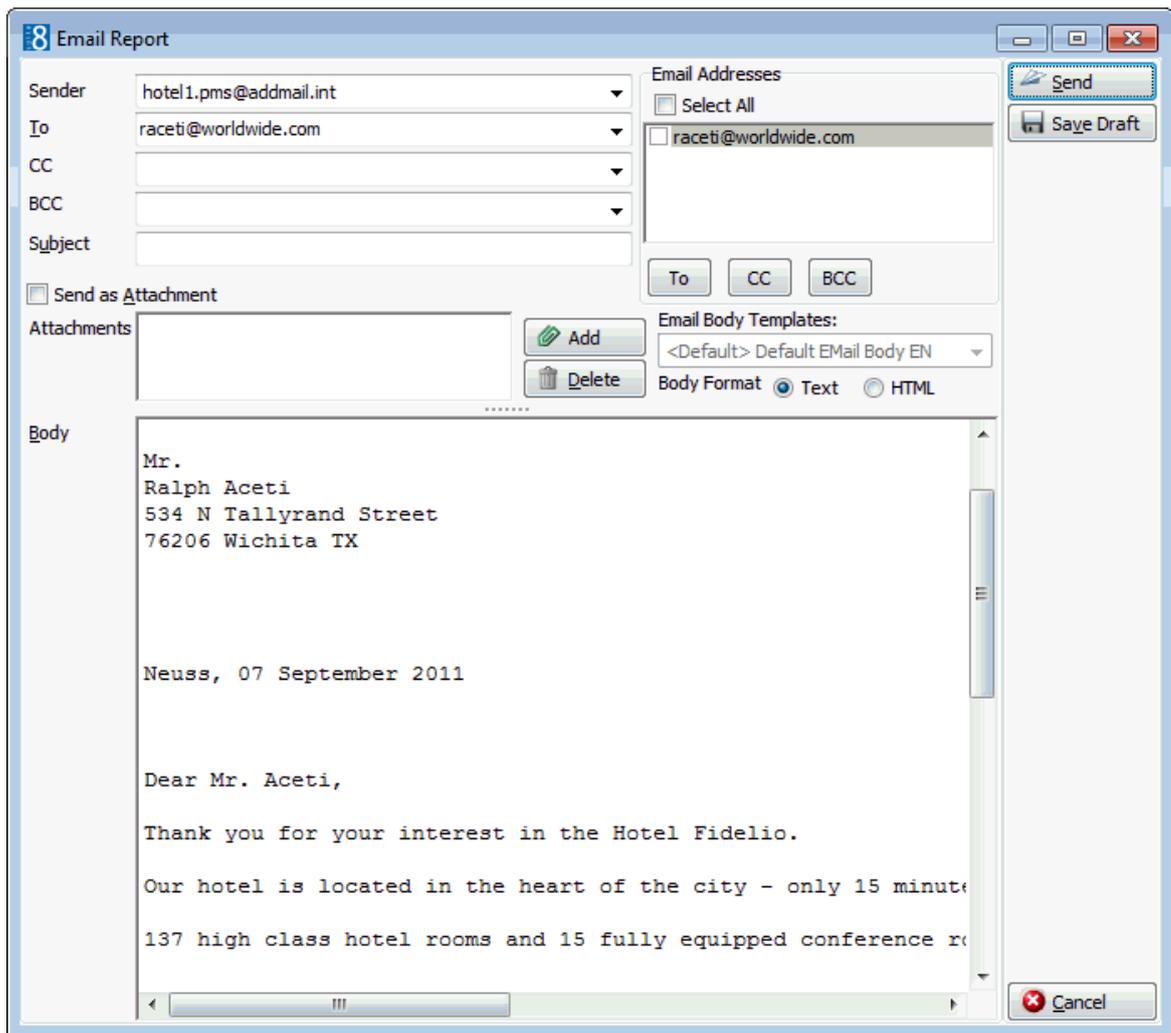
How to edit correspondence

1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.

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5. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
 6. Select the CONTACT and ADDRESS information to be used in the document.
 7. Click EDIT, the document is generated and displayed on the screen.
 8. At this point the document can be printed or saved to be printed at a later time.
 9. To print the document, click the PRINT icon.
 10. To save the document, click the SAVE icon, enter a file name to save the document.
 11. Click SAVE.
 12. Close the edit screen.

How to email correspondence

1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
6. Creating correspondence for an individual profile requires that only the ADDRESS be selected as the profile is selected by default. When creating correspondence for a company profile, the primary CONTACT and primary ADDRESS of the company is selected by default, but can be changed as required.
7. Click EMAIL, the document is generated and the email dialog box displayed.



8. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
9. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
10. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
11. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
12. In the BODY box, make sure that all the entered information is correct; any necessary changes can be made at this time.

13. If the email should be saved and sent later then click **SAVE DRAFT**, the email is saved and the template name is displayed with (E-Mail) (Saved) after the name and the date and time it was saved in the history section of the Correspondence dialog box.

14. If the email should be sent now click **SEND**, the document is generated and the email sent.

A confirmation message is displayed confirming that the message was sent.

How to email correspondence as an attachment

1. Select the appropriate profile in the grid, click the **CORRESP.** button to display the Correspondence dialog box.
2. In the **TEMPLATES** box click the drop-down arrow and select the template to be used.
3. In the **LANGUAGE** box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the **PREF. DISTRIBUTION** box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the **FAMILY GREETINGS** check box if the family letter greetings should be used.
6. Creating correspondence for an individual profile requires that only the **ADDRESS** be selected as the profile is selected by default. When creating correspondence for a company profile, the primary **CONTACT** and primary **ADDRESS** of the company is selected by default, but can be changed as required.
7. Click **EMAIL**, the document is generated and the email dialog box displayed.

The screenshot shows the 'Email Report' dialog box with the following details:

- Sender:** info@micros.com
- To:** raceti@worldwide.com
- CC:** (empty)
- BCC:** (empty)
- Subject:** YOUR RESERVATION # 2622
- Send as Attachment:** **Edit Attch.:** [button]
- Format:** Adobe Acrobat PDF
- Attachments:** [empty list with Add/Delete buttons]
- Email Addresses:** Select All, raceti@worldwide.com, amex@amex.com
- To/CC/BCC:** [buttons]
- Email Body Templates:** <Default> Default Email Body EN
- Body Format:** Text, HTML
- Text Area:** Please enter your default Email Body Text here!
- Buttons:** Send, Edit Body, Save Draft, Cancel

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8. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
 9. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
 10. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
 11. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
 12. Select the SEND AS ATTACHMENT check box if the document should be sent as an attachment rather than in the body of the email.
 13. To edit the document click the EDIT ATTACH. button, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
 14. In the FORMAT box select the format for the attachment.
 15. In the BODY box enter the text which should be included in the body of the email. If a default email body text has been defined, then this will be displayed and any required changes can be made.
 16. If the email should be saved and sent later then click SAVE DRAFT, the email is saved and the template name is displayed with (E-Mail) (Saved) after the name and the date and time it was saved in the history section of the Correspondence dialog box.
 17. If the email should be sent now click SEND, the document is generated and the email sent.

A confirmation message is displayed confirming that the message was sent.

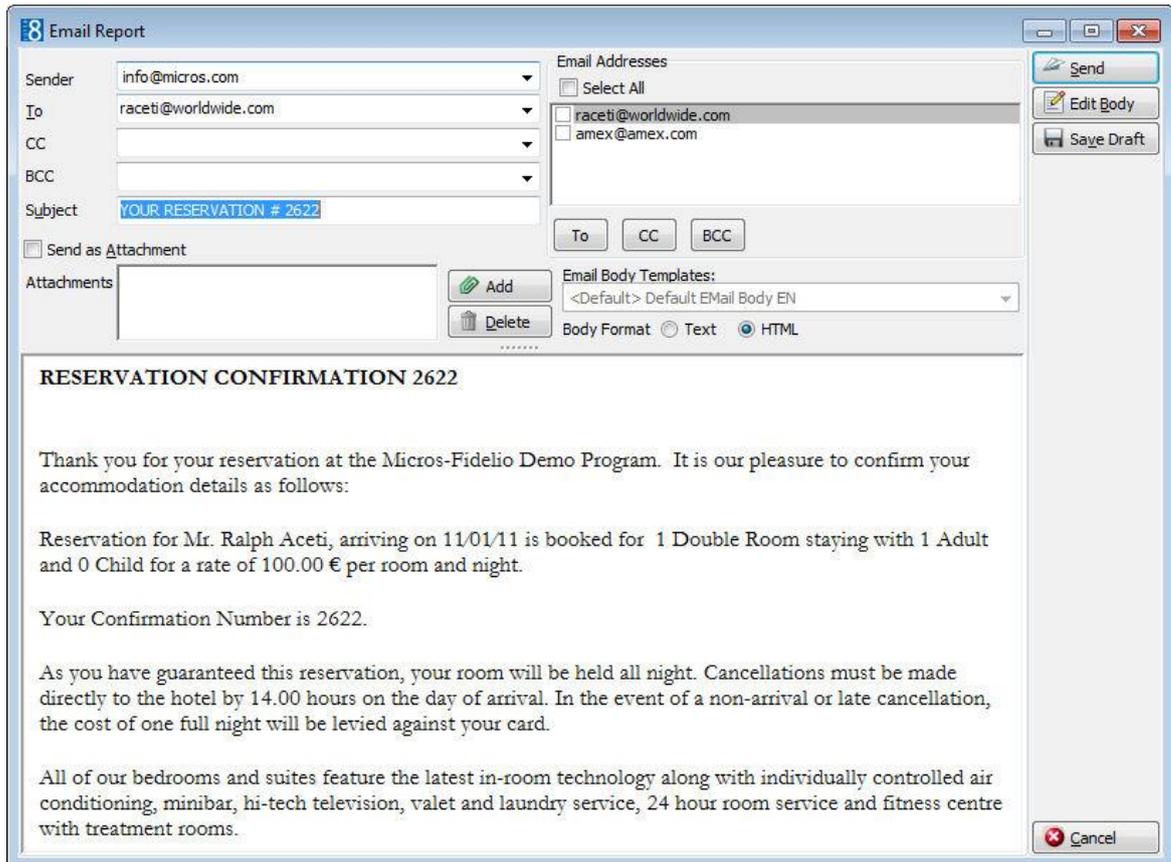
Note: Attachments sent in PDF format are automatically password protected so that no changes can be made to the original PDF.

Note: When sending correspondence as a PDF attachment, the PDF files are stored both in the database and in the Mailing Documents directory defined in the configuration. After the correspondence has been successfully sent the PDF files are removed from the database.

How to email correspondence with an attachment

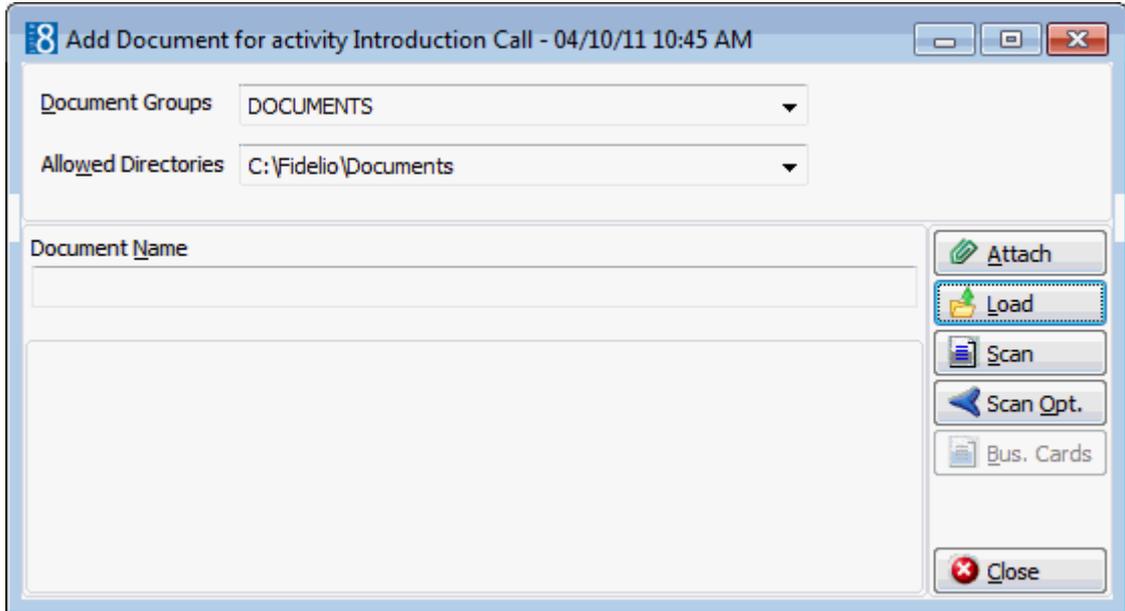
1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.

4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
6. Creating correspondence for an individual profile requires that only the ADDRESS be selected as the profile is selected by default. When creating correspondence for a company profile, the primary CONTACT and primary ADDRESS of the company is selected by default, but can be changed as required.
7. Click EMAIL, the document is generated and the email dialog box displayed.

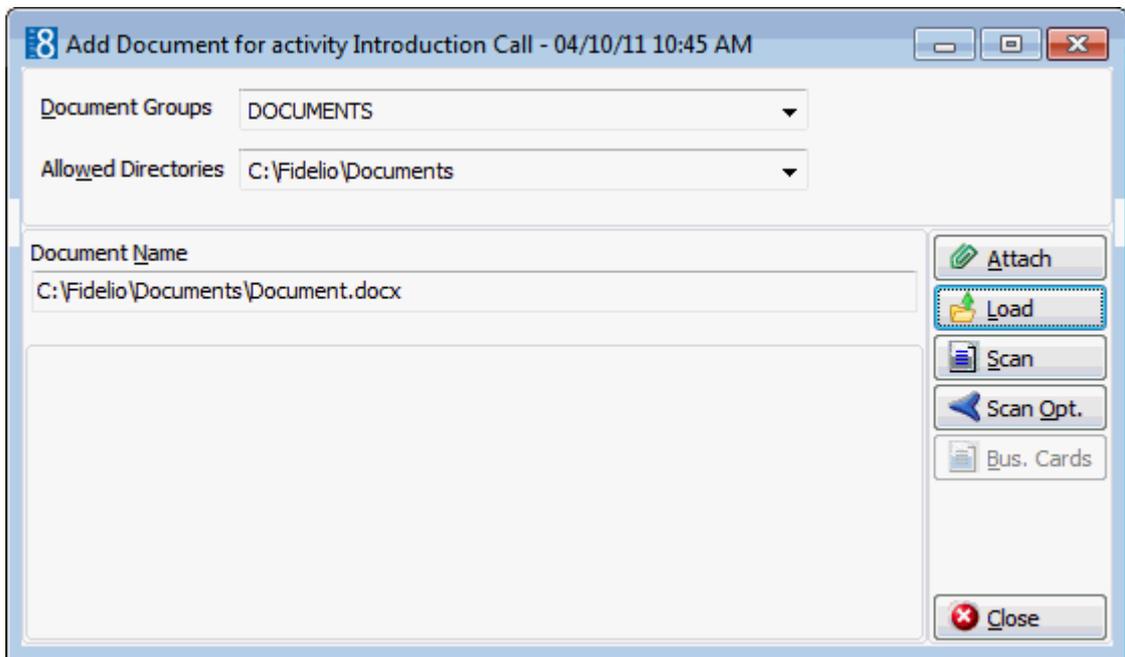


8. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
9. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
10. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.

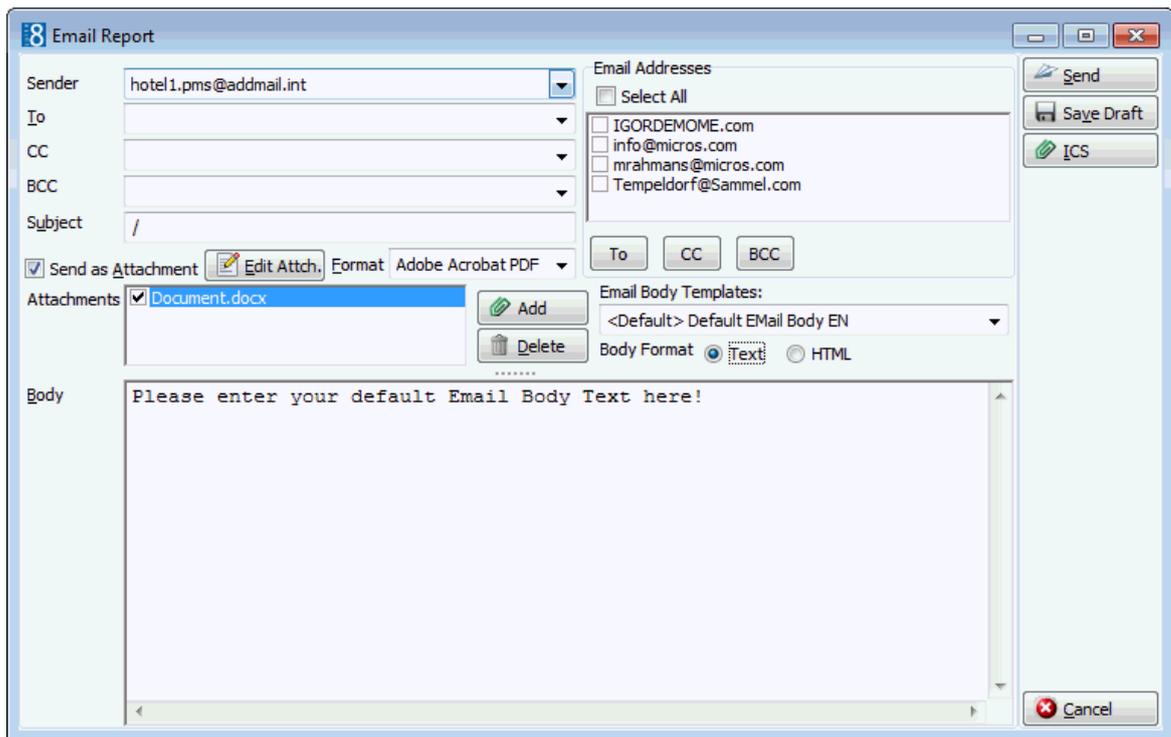
11. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
12. Click ADD, the Attach documents dialog box is displayed.



13. In the DOCUMENT GROUPS list, select the document group required.
14. In the ALLOWED DIRECTORIES list, select the allowed directory required.
15. Click BROWSE to display the list of documents.
16. Select the required document and click OPEN, the Document Name field is filled.



17. To attach the document, click ATTACH, the document is shown as a linked attachment on the email report dialog box.



18. In the BODY box, make sure that all the entered information is correct; any necessary changes can be made at this time.
16. If the email should be saved and sent later then click SAVE DRAFT, the email is saved and the template name is displayed with (E-Mail) (Saved) after the name and the date and time it was saved in the history section of the Correspondence dialog box.
17. If the email should be sent now click SEND, the document is generated and the email sent.

A confirmation message is displayed confirming that the message was sent.

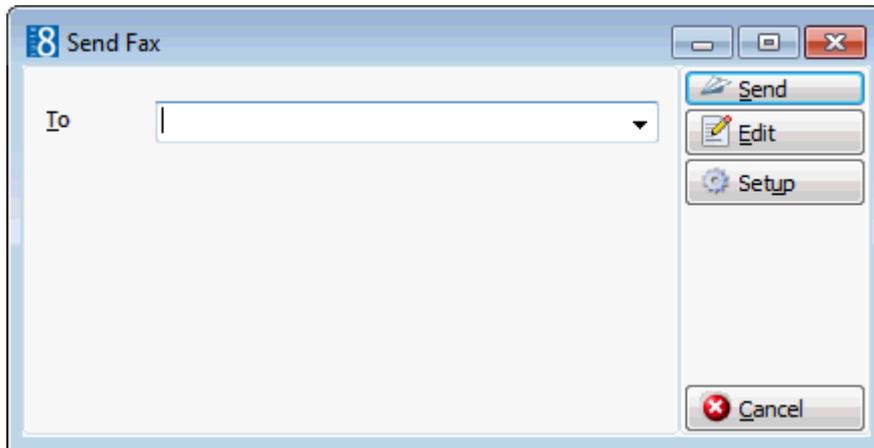
How to email saved correspondence

1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. Select the email to be sent from the list of templates in the HISTORY section of the screen.
3. Click E-MAIL HISTORY, the email is displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the email.
4. Make sure that all the entered information is correct; any necessary changes can be made at this time.
5. Click SEND, the document is generated and the email sent.
6. The document template name is displayed and the date and time it was sent in the HISTORY section of the Correspondence dialog box.

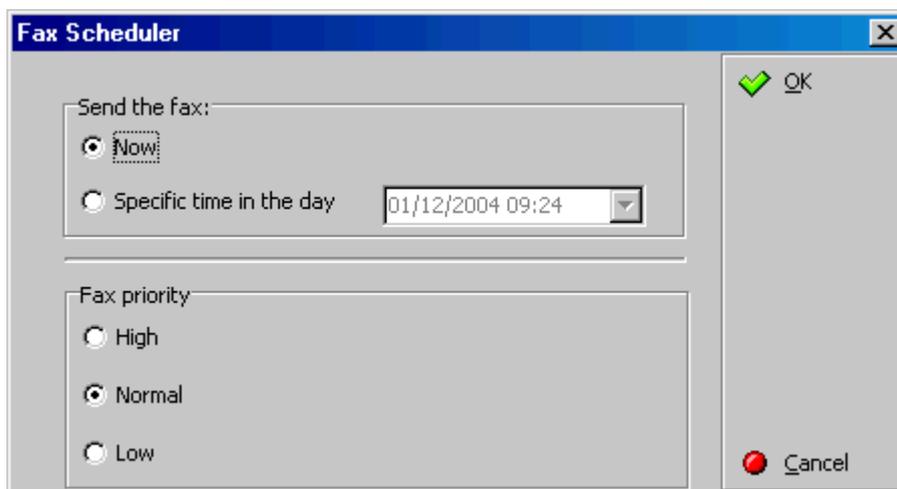
How to fax correspondence

1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.

3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
6. Creating correspondence for an individual profile requires that only the ADDRESS be selected as the profile is selected by default. When creating correspondence for a company profile, the primary CONTACT and primary ADDRESS of the company is selected by default, but can be changed as required.
7. Click FAX, the document is generated and the fax dialog box displayed.



8. The To box is automatically completed with the fax number from the profile.
9. To edit the fax click EDIT, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
10. Make sure that all the entered information is correct; any necessary changes can be made at this time.
11. To schedule the time the fax should be sent, click ADVANCED, the Fax Scheduler dialog box is displayed.

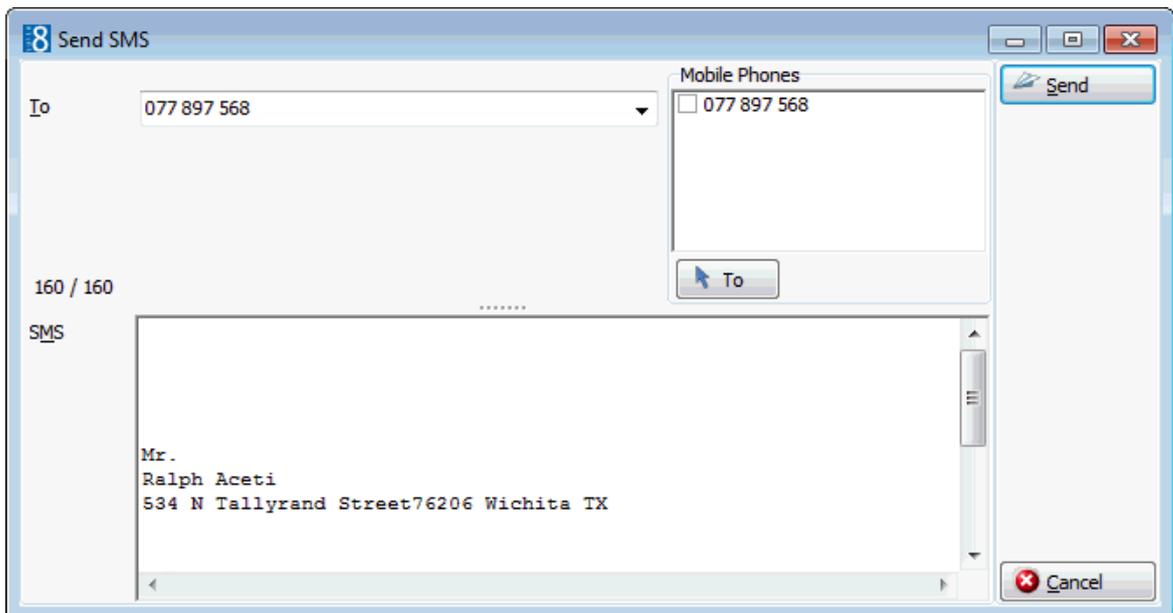


12. Select when to SEND THE FAX, the default is NOW, to specify a specific date and time select a SPECIFIC TIME IN THE DAY and enter the date and time to send the fax.

13. Select the FAX PRIORITY, the default is Normal.
14. Click OK.
15. Click Send, the document is generated and the fax sent.

How to SMS correspondence

1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used; an SMS template must contain no more than 160 characters.
3. In the LANGUAGE box click the drop-down arrow and select the language.
4. Select the ADDRESS information to be used in the SMS.
5. Click SMS, the correspondence is generated and the SMS dialog box displayed.

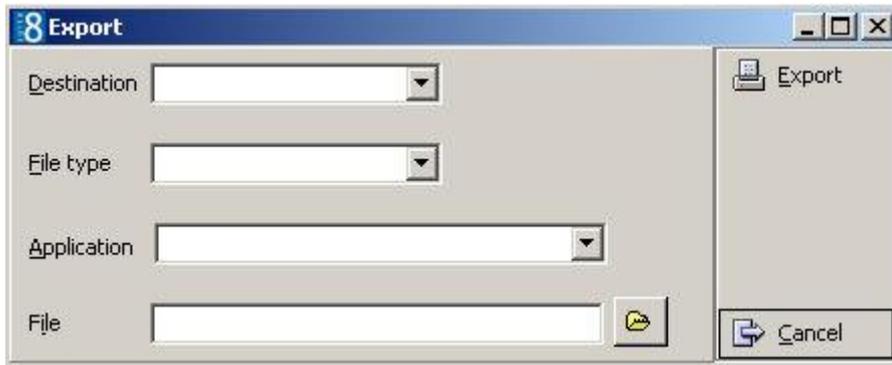


6. The To box is automatically completed with the mobile phone number from the profile, this can be changed by clicking the drop-down arrow and selecting the mobile phone number to which this SMS should be sent or by selecting the required mobile phone numbers from the list of available in the panel on the upper right-hand side and clicking the To button.
7. In the SMS box, make sure that all the entered information is correct; any necessary changes can be made at this time.
8. Click SEND to send the SMS.

How to export correspondence

1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.

5. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
6. Creating correspondence for an individual profile requires that only the ADDRESS be selected as the profile is selected by default. When creating correspondence for a company profile, the primary CONTACT and primary ADDRESS of the company is selected by default, but can be changed as required.
7. Click EXPORT, the document is generated and the export dialog box displayed.



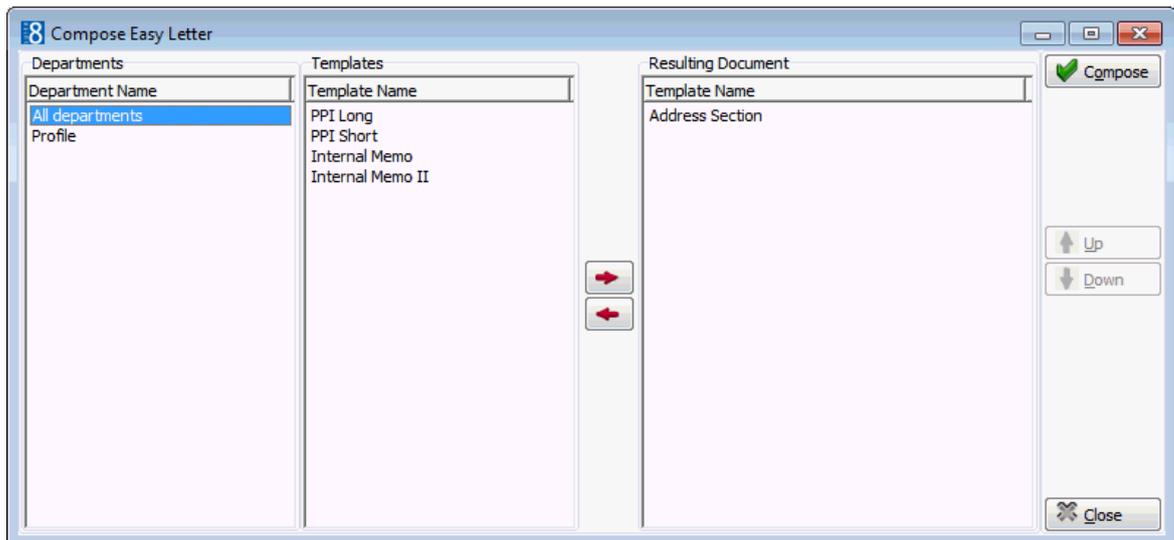
8. In the DESTINATION box, click the drop-down arrow and select if the document is being exported to a file or to an application, such as MS Word or MS Excel.
9. In the FILE TYPE box, click the drop-down arrow and select the file type to be used for the export. One of the most commonly file types is Rich Text Format as it allows the document to be edited and the correct format to be kept.
10. This option is only available if TOAPPLICATION was selected as the Destination type. Click the drop-down arrow and select the application type.
11. The FILE box is automatically completed with a file name taken from the reports section, but can be changed as required. To select a different file, click the folders button.
12. Click EXPORT, the document is generated and exported.

How to create an easy letter

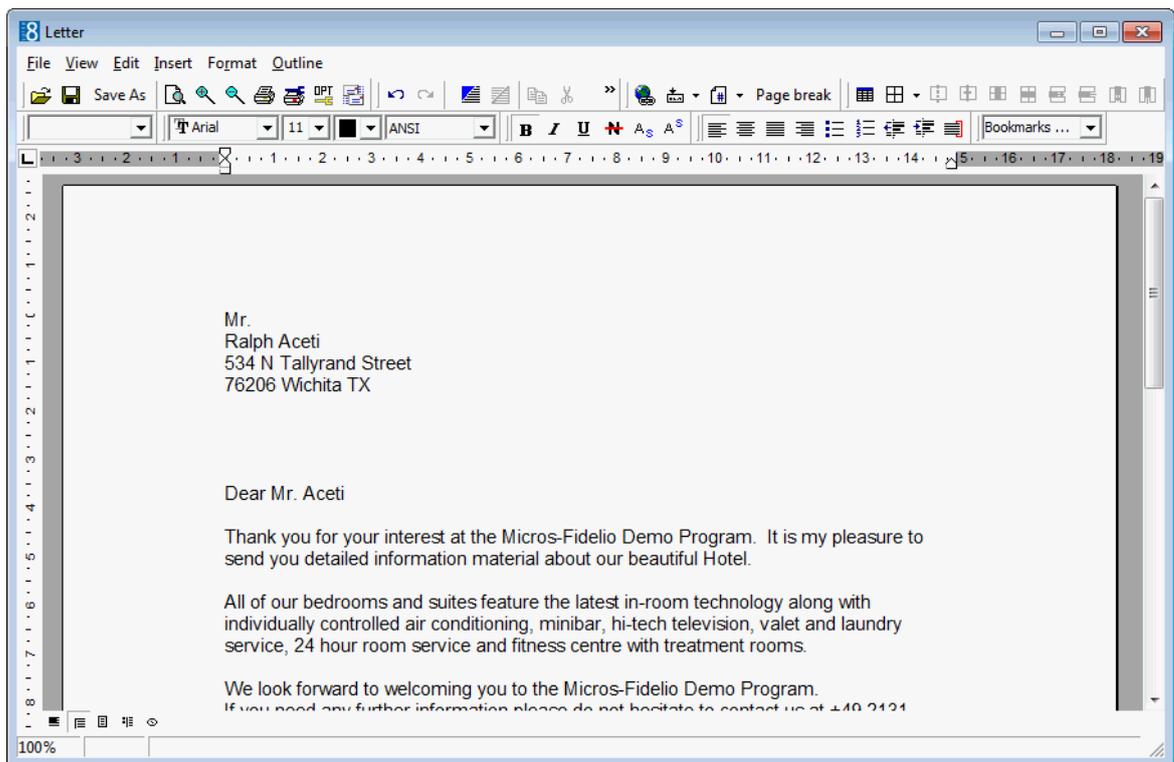
1. Select the appropriate profile in the grid, click the CORRESP. button to display the Correspondence dialog box.
2. Creating correspondence for an individual profile requires that only the ADDRESS be selected as the profile is selected by default. When creating correspondence for a company profile, the primary CONTACT and primary ADDRESS of the company is selected by default, but can be changed as required.
3. Click EASY LETTER.

The Compose Easy Letter screen is split into 3 sections:

- Departments - lists the available departments; ALL DEPARTMENTS lists all available templates.
- Templates - lists the available templates; templates are displayed according to the selected department.
- Resulting Document - lists the templates which are selected by default.



4. Select the required department from the DEPARTMENTS list; the templates belonging to the selected department are displayed in the TEMPLATES list.
5. Select the required template from the list of available TEMPLATES; click the arrow button to move the template to the RESULTING DOCUMENT window on the right.
6. Repeat step 3 for all the required templates. The order of the templates may be changed using the UP and DOWN arrows.
7. Click the COMPOSE button to display the Internal Editor screen.



8. Make any additions or changes to the letter as required.
9. To print the letter, click FILE then PRINT.
10. To email the letter click FILE then E-MAIL.
11. To save the letter click FILE then SAVE AS.
12. Allocate a FILE NAME, choose the location to save the letter and click SAVE.

The letter is saved in RTF format.

13. Click FILE then CLOSE to exit the Internal Editor.

Organizational chart

An Organization chart displays the individual profiles linked to a company and may be viewed via the company profile tree. Each linked profile is assigned a role, role selection may include, Contact, Booker, Decision Maker, Signs Checks or Negotiator.

Creating an Organizational Chart

To create an Organizational chart the relevant individual profiles must be linked to the company profile and a role assigned. This can be done in one of the following ways:

- On the Company Linked Profiles tab set a link to an individual profile.
- On the Company tree set a link to an individual profile.
- On the Individual Linked Profiles tab set a link to the company profile.
- On the Individual profile tree set a link to the company profile.

Inactive linked contacts are greyed out and marked with an asterisk [*].

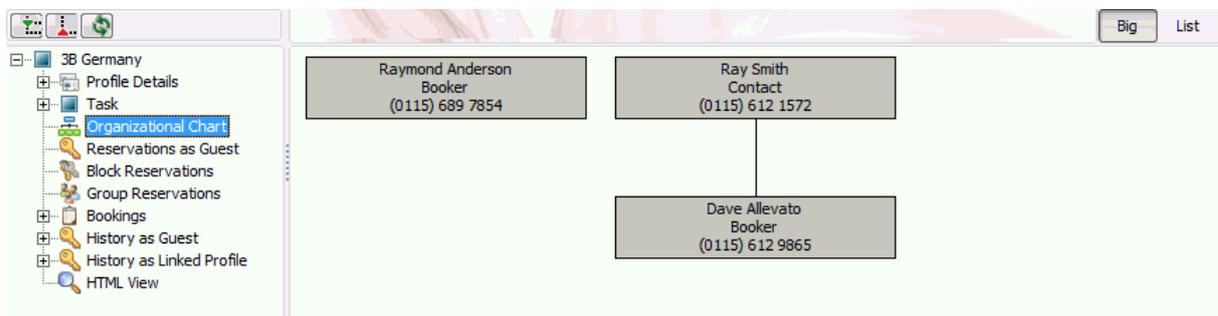
How to Assign Managers

1. Click the CUSTOMER RELATION menu and select PROFILES to display the customer profile screen.
2. Locate the profile to which a manager is to be assigned, click the EDIT PROFILE button and select the MORE FIELDS tab.
3. In the MANAGER box click the drop-down arrow and select the person that is the superior manager of the currently selected individual.
4. Click OK to close the profile screen.

How to view the Organizational Chart

1. Click the CUSTOMER RELATION menu and select PROFILES to display the customer profile screen.
2. Search for and select the appropriate company profile in the grid.
3. The query results are shown in grid format in the middle section of the screen and the tree and HTML formats are shown in the lower section of the screen.
4. On the tree select ORGANIZATIONAL CHART.

The Organizational chart is displayed in HTML format.



Note: If a company has only one linked individual profile then the MANAGER field is not displayed on the MORE FIELDS tab of the individual profile, as a manager cannot be assigned if there is only one linked profile.

The same applies when two individual profiles have been linked to a company and a manager has already been assigned to one of the profiles. In this case, the second individual profile will not show the MANAGER field.

Business Card Scanner

If a business card scanner is installed it is possible to scan business cards on workstations which are equipped with a business card reader. The BUS. CARDS button next to the profile grid is displayed by defining the Business Card Scanner settings in configuration.

How to scan a business card

1. Click the CUSTOMER RELATION menu and select PROFILES to display the Customer Profile screen.
2. Search for the required profile and highlight it in the grid.
3. Click BUS. CARDS to display the business card scanner dialog box.

The screenshot shows the 'Business Card Scanner' dialog box. The main area is titled 'Profile information' and contains a form for entering profile details. The form includes fields for Name (First, Middle, Last), Title, Address, Company, Phone, City, Fax, State, Email, Postal, WWW, and Country. There is also a '2nd Addr' section with fields for Address, City, State, Postal, and Country. On the right side, there are controls for 'Card sides' (set to 1) and 'Current side' (set to 1), a checked checkbox for 'Check card automatically', and a 'Configuration' panel with buttons for 'Check for card', 'Scan configure', and 'Settings'. Below the configuration panel are buttons for 'Acquire card', 'Load image', 'Save image', 'Recognize', 'Search', and 'Raw information'. A 'Close' button is located at the bottom right of the dialog box.

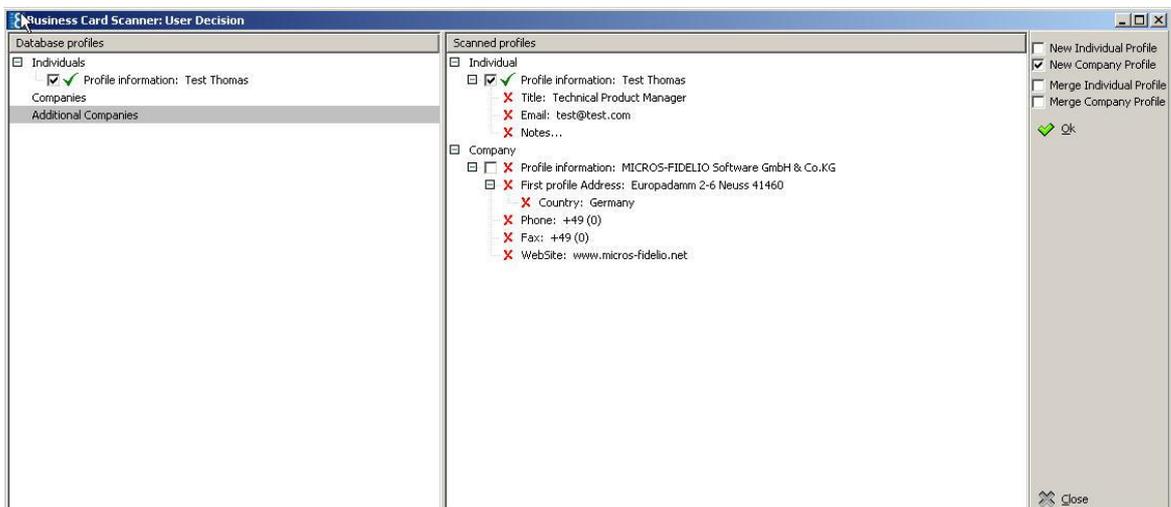
4. Place a business card in the business card scanner.
5. The field Card Sides has a default setting of 1, if the business card is double sided change the number of card sides to 2.
6. The card details may be acquired in one of the following ways:

- Select the check box CHECK CARD AUTOMATICALLY, the business card scanner will be checked automatically, the card scanned and the card image displayed. Click the RECOGNIZE button to fill the fields.
- Ensure the CHECK CARD AUTOMATICALLY check box is not selected, click the CHECK FOR CARD button, the business card scanner will be checked, the card scanned, the image displayed and the fields filled.
- Ensure the CHECK CARD AUTOMATICALLY check box is not selected, click the ACQUIRE button, the business card scanner will be checked, the card scanned and the card image displayed. Click the RECOGNIZE button to fill the fields.

The business card scanner dialog box is displayed with the card image and the fields filled.

The Country field is completed automatically if the country code on the business card matches the country code in Version 8 otherwise the country can be selected from the drop-down list.

7. Click the SEARCH button to search for existing profiles. If no duplicate profile is found a message is displayed.
8. Select YES to access the User Decision dialog box.
9. Select to create a new individual/new company profile or if the profile information should be merged.
 - The left side shows the existing profile. Additional Companies will be displayed when the contact is linked to more than one company.
 - The right side shows the scanned profile and its details.
 - Consistent entries are marked with a  green tick mark and non consistent entries are marked with a  red cross.



10. Click OK to activate profile creation or merge.

Note: When merging profiles, the information from the scanned profile will be merged into the existing database profile.

How to scan a two-sided business card

1. Click the CUSTOMER RELATION menu and select PROFILES to display the Customer Profile screen.
2. Search for the required profile and highlight it in the grid.
3. Click BUS. CARDS to display the business card scanner dialog box.

4. Place a business card in the business card scanner.
5. In the Card Sides field change the number of card sides to 2.
6. Change the entry in the Current Side field accordingly during the process of card recognition.
7. Continue with the card scanning as described in How to scan a business card.

Note: Information stored under additional information will be saved as a profile note. Second address information will be saved as a second address on the profile.

Business card scanner dialog box

Field	Definition
Card sides	If the business card has two sides, change the card sides to two. Default is one.
Current Side	Must be changed for the card recognition of two sided business cards.
Check Card automatically	When this option is used, the card scanner is checked and if there is a card in the Business card scanner, it will be scanned. To activate recognition and fill the fields, the 'Recognize' button has to be pressed.
Configuration	
Check for Card	When this option is used the scanner is checked and if there is a card in the Business card scanner, it will be scanned and recognised automatically.
Scan configure	Use this option to switch between colour and black/white modus.
Settings	This option allows changing some of the default settings configured under global settings. For example: if the next business card is one of a travel agent, the profile type should be changed via this option.
Acquire Card	Click this button to scan the card and display the image. To activate recognition and fill the fields the 'Recognize' button has to be pressed.
Load Image	Loads card images that have previously been scanned and saved to a drive. Saved card images can be processed (imported) at any time.
Save Image	This option will save the scanned business card image to a selected drive.
Recognize	The information from the scanned business card image will be taken and filled in the relevant fields of the profile table.
Search	Searches in the profile database for the same profile. If it does not exist, it will be created. If the company and /or the contact profile already exist the scanned data will be compared with the existing data and can be either merged or created.
Raw Information	Shows the business card field information in no particular format (raw).

Business card scanner profile merge dialog box

Field	Definition
New Individual Profile	This option will create a new individual profile.
New Company Profile	This option will create a new company profile.
Merge Individual Profile	Will merge the individual profile information.
Merge Company Profile	Will merge the company profile information.

 Business Card functionality is defined via the option ENABLE BUSINESS CARD under the Setup → Configuration → Global Settings → Profile → Profile 2 tab.

Options

Profile Notes

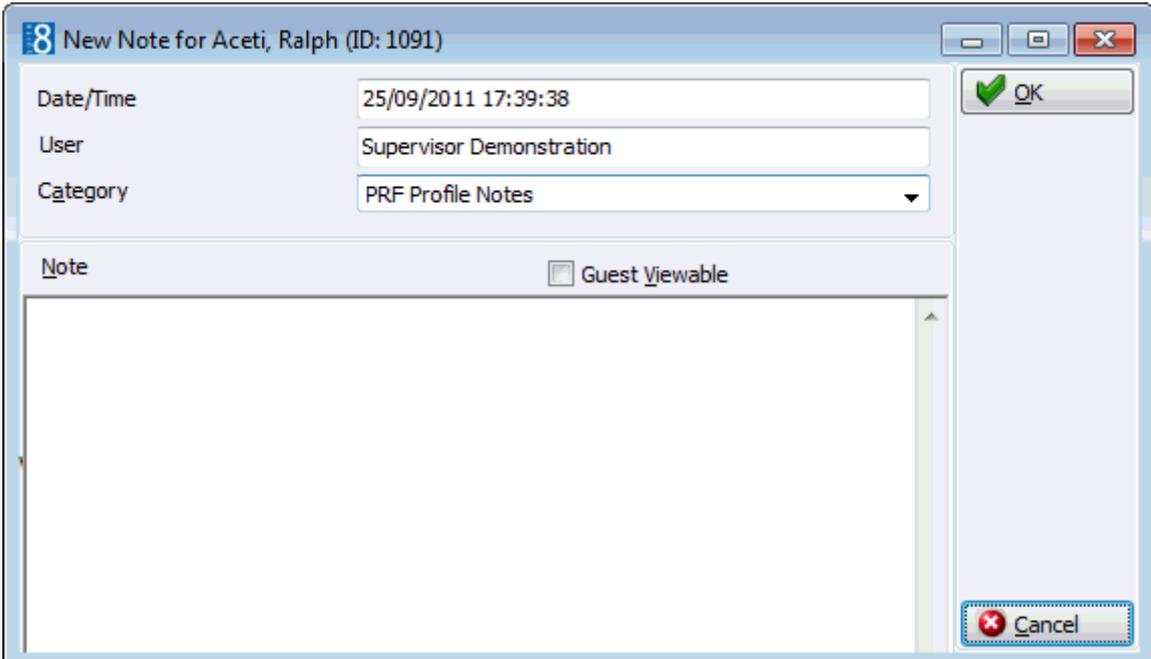
The notes tab stores information regarding the guest or company. Notes are divided up into user-definable categories and can be marked as viewable by the guest; guest viewable notes are highlighted in red. An unlimited number of notes can be added to each profile and a counter on the bottom left of the profile edit screen shows the number of existing notes for that profile.

Notes can be viewed, edited or added in one of three ways:

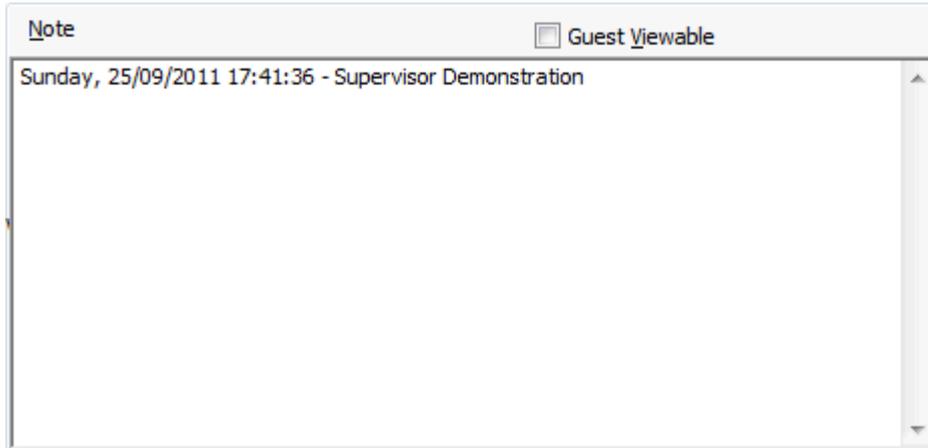
- Via the NOTES tab in the profile edit screen.
- Via the OPTIONS button next to the profile grid.
- Via the NOTES option on the Profile Tree.

How to add a new note via the profile

1. Click the CUSTOMER RELATIONS menu and select PROFILES or right-click on PROFILE DETAILS in the profile tree and select EDIT to display the Customer Profiles screen.
2. Search for and select the required profile, then click the EDIT PROFILE button.
3. Click the NOTES tab to display the notes dialog box.
4. Any existing notes are listed in the upper part of the dialog box.
5. Click the NEW button to display the Add note dialog box.



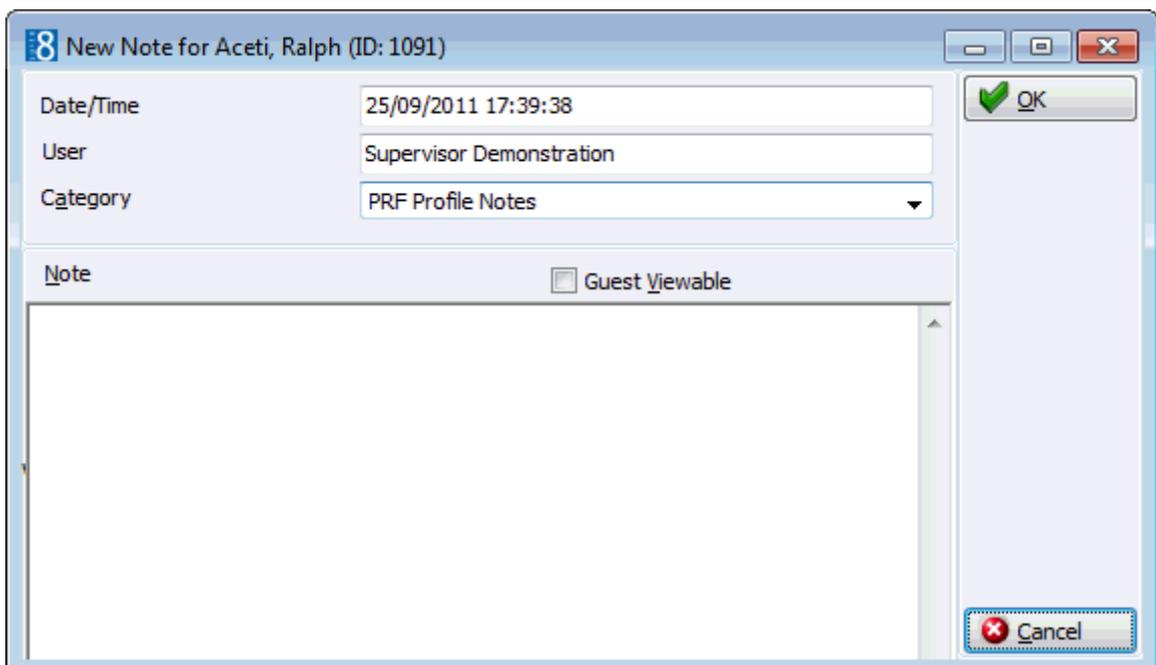
6. The DATE/TIME and USER are automatically completed.
7. Select a NOTE CATEGORY from the drop-down list.
8. Select the option GUEST VIEWABLE if the guest is allowed to view the note.
Depending on the definition and setup of any customer correspondence, this option is used to control which notes should appear on contracts, offers or letters. Leave it empty if you do not want the guest to be aware of this note.
9. In the NOTE box enter the text for the note.
10. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.



11. Click OK to save the note.

How to add a new note via the options button

1. Click the CUSTOMER RELATIONS menu and select PROFILES or right-click on PROFILE DETAILS in the profile tree and select EDIT to display the Customer Profiles screen.
2. Search for and select the required profile, then select NOTES from the OPTIONS menu of the profile navigator.
3. Any existing notes are listed in the upper part of the dialog box.
4. Click the NEW button to display the Add note dialog box.



5. The DATE/TIME and USER are automatically completed.
6. Select a NOTE CATEGORY from the drop-down list.
7. Select the option GUEST VIEWABLE if the guest or company is allowed to view the note. Depending on the definition and setup of any customer correspondence, this option is used to control which notes should appear on contracts, offers or letters.
8. In the NOTE box enter the text for the note.
9. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.

The screenshot shows a dialog box titled 'Note'. In the top right corner, there is a checkbox labeled 'Guest Viewable'. The main area of the dialog box contains a text field with the text 'Sunday, 25/09/2011 17:41:36 - Supervisor Demonstration'. The dialog box has a standard Windows-style border and a scroll bar on the right side.

11. Click OK to save the note.

How to edit a note

1. Search for and select the required profile, then select NOTES from the OPTIONS menu of the profile navigator.
2. Select the note to be edited and click the EDIT button to display the Edit Note dialog box.
3. Make any changes required and click OK to save the note.

How to delete a note

1. Search for and select the required profile, then select NOTES from the OPTIONS menu of the profile navigator.
2. Select the note to be deleted.
3. Click the DELETE button, a confirmation message is displayed.
4. Click YES, the note is deleted.

 Note Categories are defined via the option NOTES CATEGORIES under Setup → Configuration → CRM. Note Categories can be defined to be restricted and then only users with the appropriate user rights can view, edit, insert or delete a restricted note. Note categories can also be defined to pop-up when editing the profile.

 Restricted notes functionality is controlled by the rights under the user right RESTRICTED NOTES under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Text Templates

Text templates may be created and used where the same text is required very often or where the same basic text can be used and minor adjustments made.

Text templates can be created in one of two ways:

- Via the NOTES dialog box.
- Via the option TEXT TEMPLATES under Setup → Configuration.

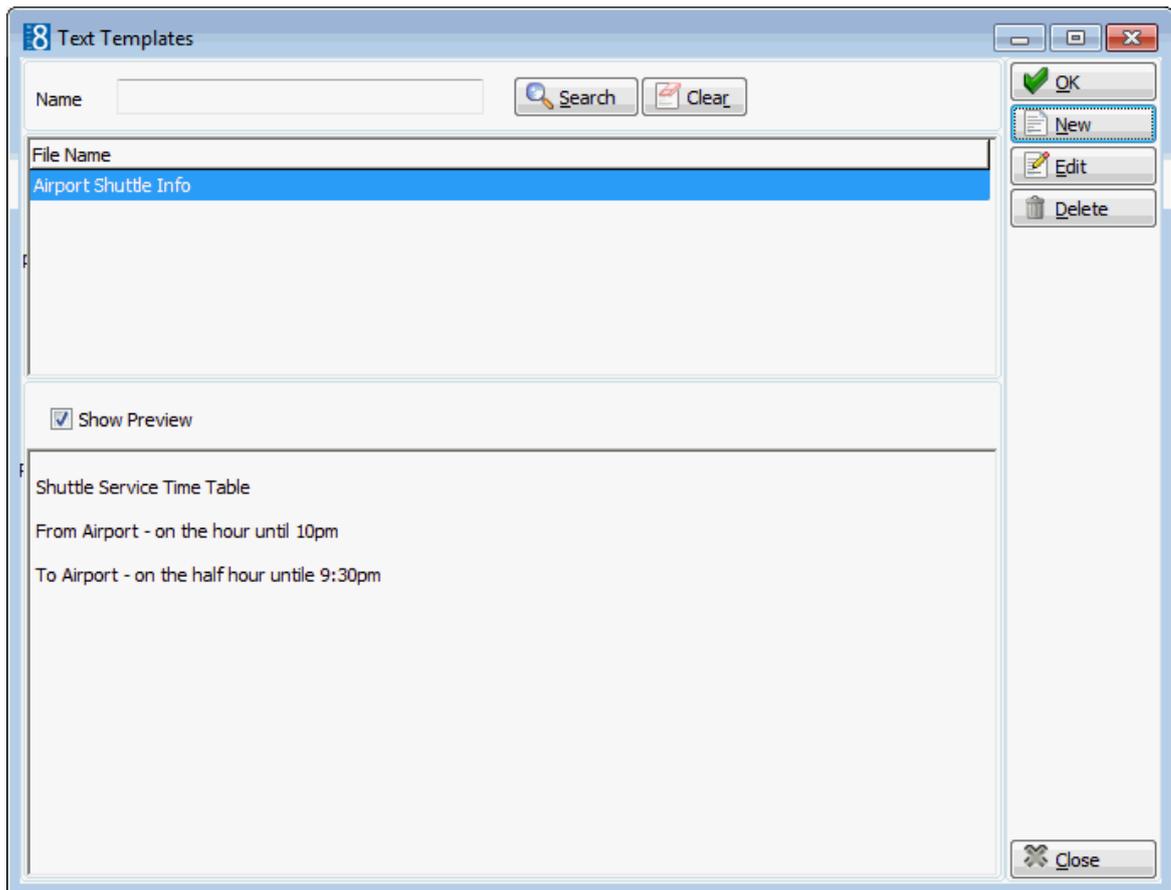
How to add a template

1. Select any profile and click the NOTES button to display the notes dialog box.
2. Click NEW to open the Add Note dialog box.

3. Enter the text required for the template.
4. Press ALT + E to export the text, the Text Template dialog is displayed.
5. Allocate a FILE NAME for the template.
6. Click OK to save the template.
7. The Add Note dialog is re-displayed; click OK to save the text as a note or CANCEL to exit from the Add Note dialog screen.
8. Click CLOSE to close the Notes dialog box.

How to import a template

1. Select any profile and click the NOTES button to display the notes dialog box.
2. Click NEW to open the Add Note dialog screen.
3. Place the cursor in the note box and press ALT + I to import a text template.
4. The Text Template dialog is displayed listing all available templates.



- To search for a template, enter a template NAME, click SEARCH.
 - To edit an existing template, click the EDIT button.
 - To create a new template, click the NEW Button.
5. Double-click the required template or highlight the required template from the list and click OK.
 6. The Add Note dialog is displayed with the template in the NOTE box.
 7. Make any adjustments necessary and click OK to save the note.
 8. Click CLOSE to close the Notes dialog box.

Note: Text template can also be imported in to the body part of the print screen when sending emails.

-  Access to the Notes tab is controlled by the user right NOTES under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Profile Tabs. If the EDIT right is enabled then the fields are accessible and all other rights applicable to the Notes screen are taken into consideration. If the EDIT right is denied then the fields are view only. This user right takes higher priority over the NOTES user rights.
-  Adding or editing notes is controlled by the user right NOTES under Setup → Configuration → Users → User Definition → Rights → Customer Profiles.
-  Note categories are defined via the option NOTES CATEGORIES under Setup → Configuration → CRM.

-
-  Text templates may also be defined via the option TEXT TEMPLATES under Setup → Configuration → Miscellaneous.

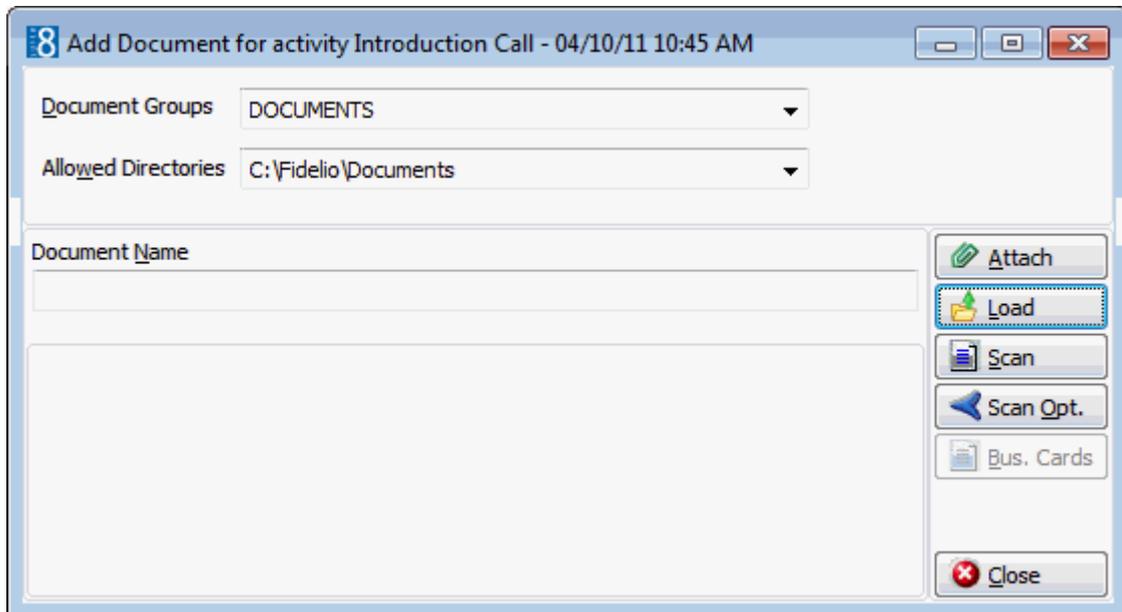
Linked Documents

This option enables the user to view, edit or add different types of documents to a profile, task or activity. It is recommended to place these documents on a shared network path to which all users have access. If a scanner is connected to the workstation you can also scan and attach documents such as contracts, letters or pictures. The scanner needs to be 'Twain' compatible.

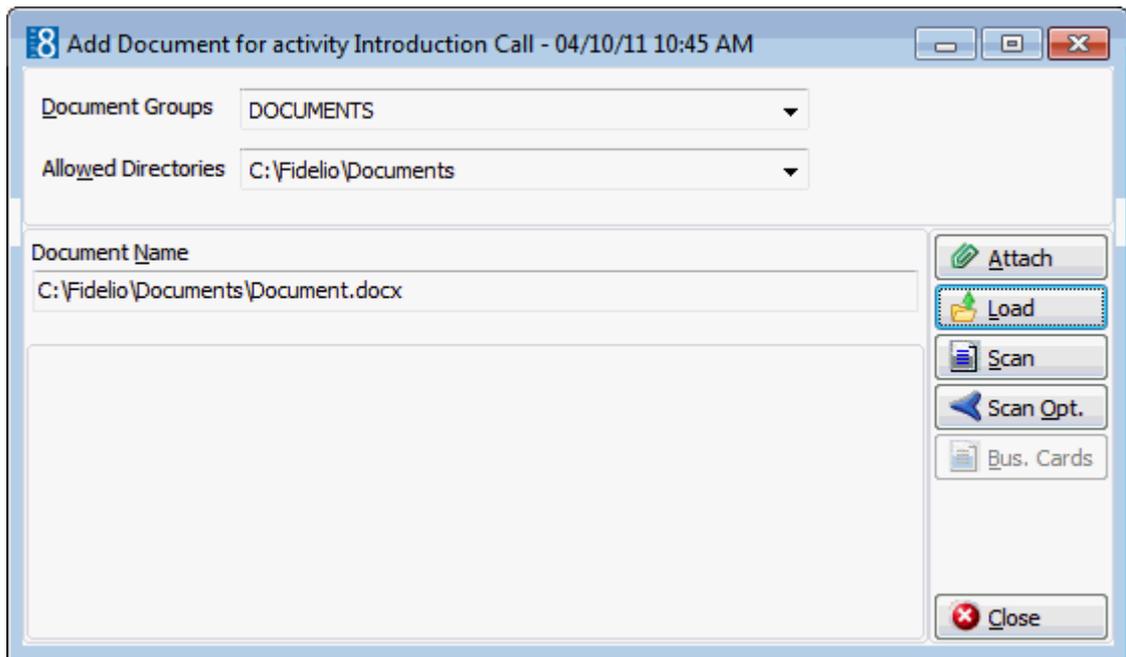
Note: The linked documents dialog box may be viewed from various access points, access is via the linked documents tab or via the options button, if available.

How to link a document

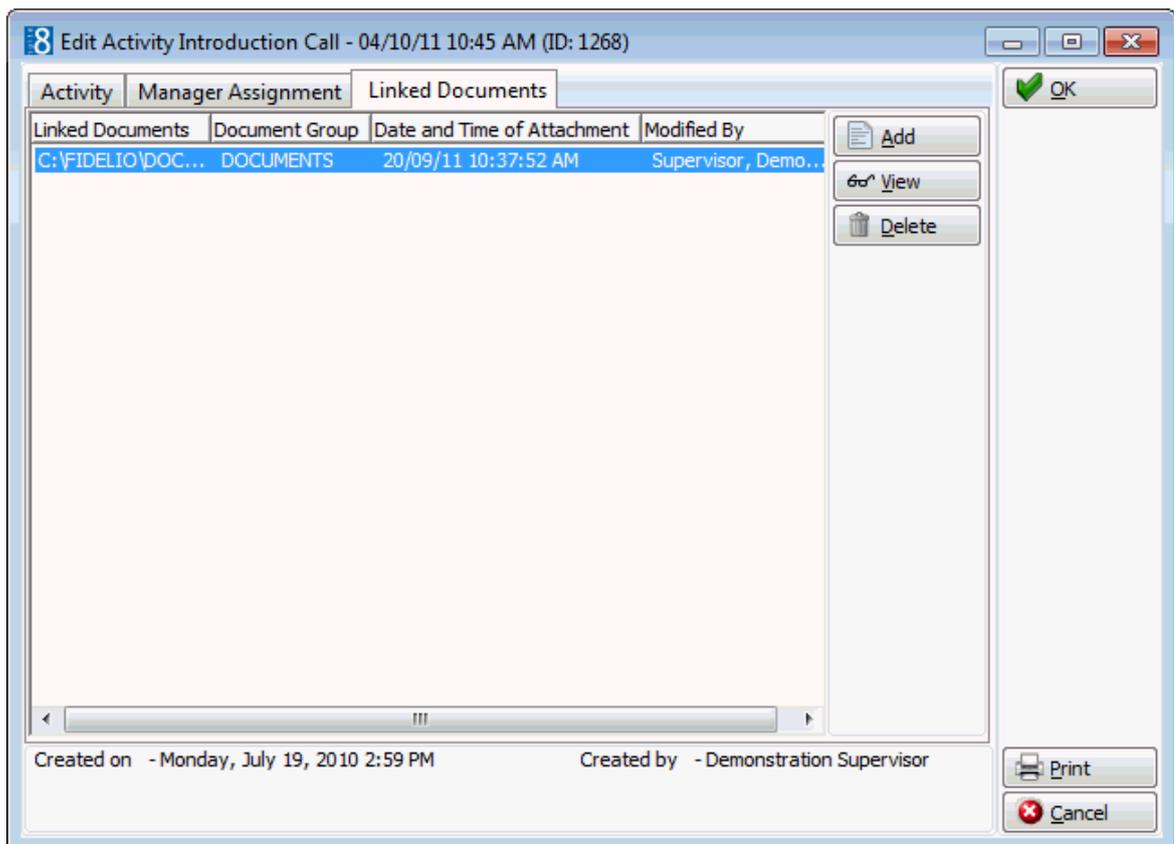
1. Select the LINKED DOCUMENTS tab.
2. Click ADD, the Attach documents dialog box is displayed.



3. In the DOCUMENT GROUPS list, select the document group required.
4. In the ALLOWED DIRECTORIES list, select the allowed directory required.
5. Click LOAD to display the list of documents.
6. Select the required document and click OPEN, the Document Name field is filled.



- To attach the document, click ATTACH, the document is shown as linked on the linked documents tab.



Note: Pictures or images may be attached in JPG or BMP format. The default setting is JPG, but this may be changed via the OPTIONS button. The selected settings will be saved for that user.

How to view/edit a linked document

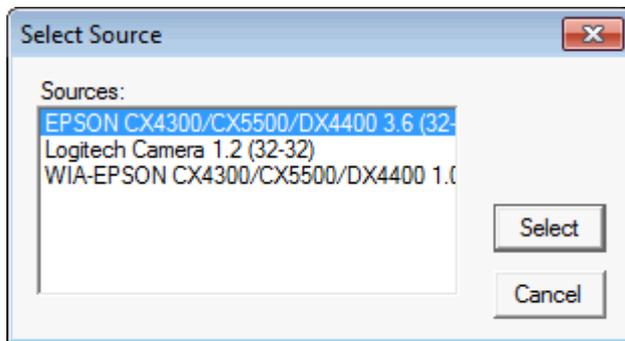
1. Select the LINKED DOCUMENTS tab.
2. Select the document and click VIEW.

Suite8 opens the relevant application, for example, Word if the document is a Word document.

Note: The document may be edited directly from within the opened application.

How to scan and link a document

1. Select the LINKED DOCUMENTS tab.
2. Click ADD, the attach documents dialog box is displayed.
3. In the DOCUMENT GROUPS list, click the document group required.
4. In the ALLOWED DIRECTORIES list, click the allowed directory required.
5. Click SCAN, the select source dialog box is displayed.



6. Select the source and click SELECT to open the scanner application.
7. Scan the document.
8. Click ATTACH to link the scanned document.

 Document groups and path are defined via the option DOCUMENT TYPES under Setup → Configuration → Miscellaneous.

 Adding or editing documents on the linked documents tab is controlled by the user right LINKED DOCUMENTS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Attach documents.

Free Nights

This option is used to assign free nights to a guest profile. Properties may for example, offer a free nights stay to frequent guests, the guests can then use this to stay in your property or may transfer the free night to another guest if allowed.

Free nights attached to a profile may be used by linking them to a reservation. Free nights are indicated on the reservation edit screen as follows:

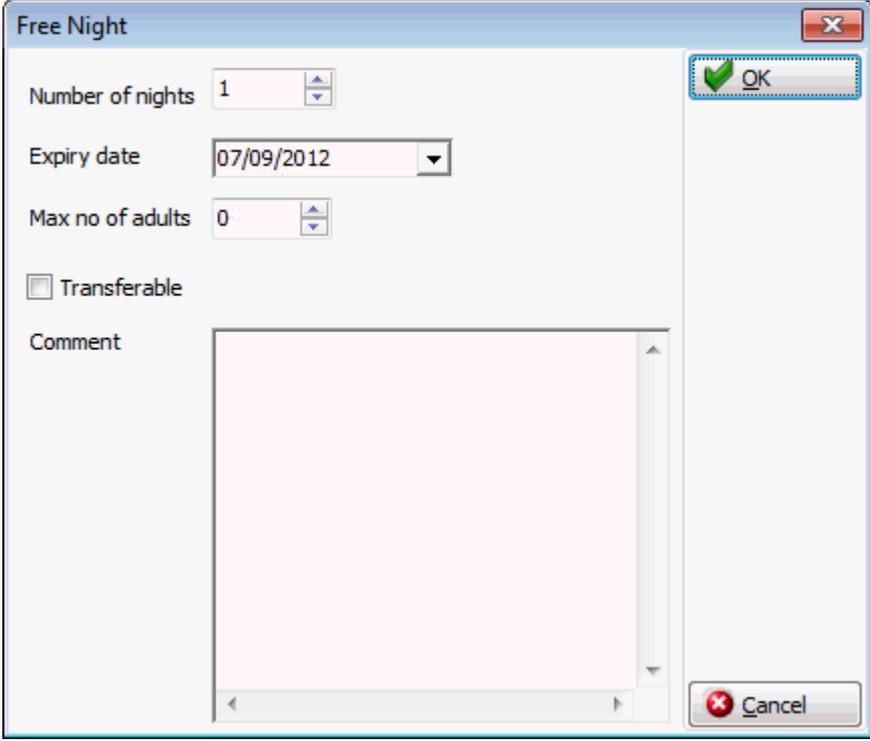
A  button with grey text indicates available free nights.

A  button with black text indicates free nights which are already linked to the reservation.

How to link free nights to a guest profile

1. On the profile search screen select the profile entitled for a free night stay.

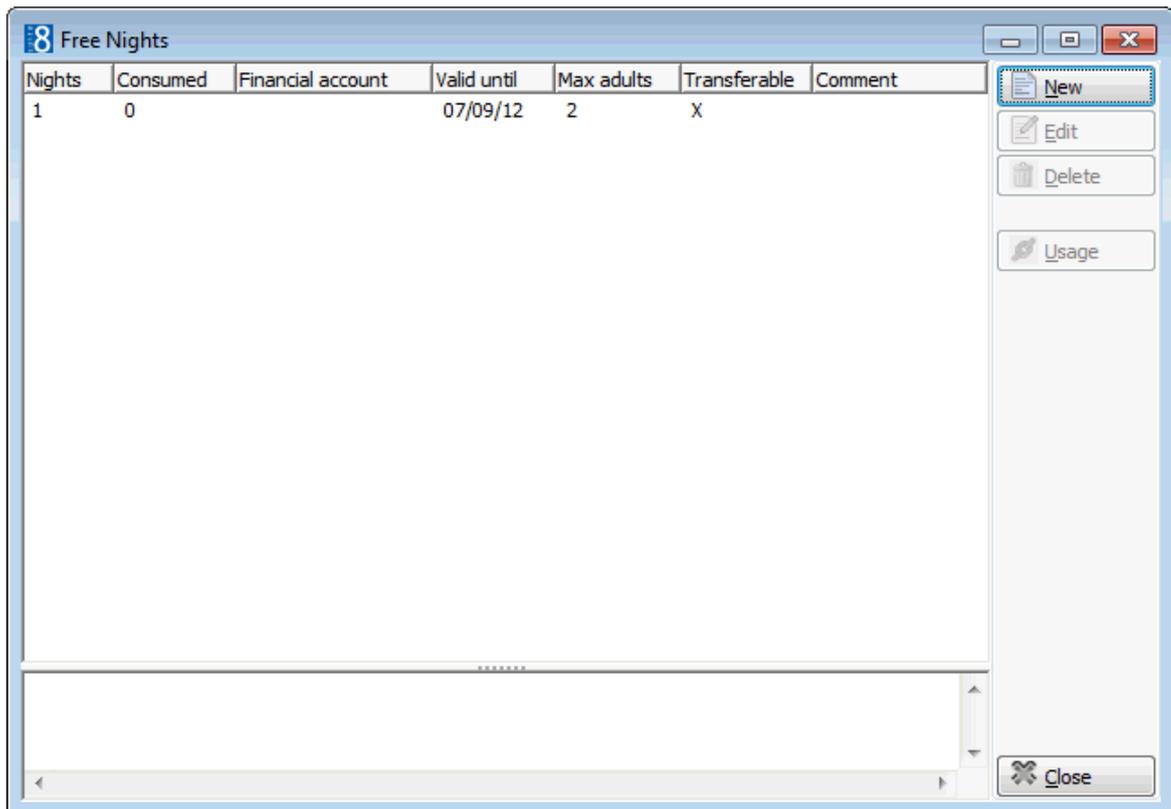
2. Select FREE NIGHTS from the OPTIONS menu of the profile navigator.
The Free Nights screen is displayed.
3. Click the NEW button to display the Free Night dialog box.



The image shows a 'Free Night' dialog box with the following fields and controls:

- Number of nights:** A numeric spinner box containing the value '1'.
- Expiry date:** A date picker box showing '07/09/2012' with a downward arrow.
- Max no of adults:** A numeric spinner box containing the value '0'.
- Transferable:** A checkbox that is currently unchecked.
- Comment:** A large text area for entering additional information.
- Buttons:** An 'OK' button with a green checkmark icon and a 'Cancel' button with a red 'X' icon.

4. In the NUMBER OF NIGHTS field enter the total free nights to be assigned.
5. Type the expiry date for the free nights in the EXPIRY DATE box **or** click the drop down arrow and select a date from the calendar.
6. In the MAX NO OF ADULTS box enter the maximum number of adults allowed for the free night stay.
7. Select the TRANSFERABLE check box if the free night can be transferred to another profile.
8. In the COMMENT box enter any additional information.
9. Click OK, the new free nights record is displayed in the Free Nights list.



How to edit free nights

1. On the profile search screen select the required profile and then select FREE NIGHTS from the OPTIONS menu of the profile navigator.
2. Select the free night record to be edited and click the EDIT button to display the Free Night dialog box.
3. Make any changes necessary.
4. Click OK to save the changes.

How to delete free nights

1. On the profile search screen select the required profile and then select FREE NIGHTS from the OPTIONS menu of the profile navigator.
2. Select the free night record to be deleted and click the DELETE button.

How to view absorbed free nights

1. On the profile search screen select the required profile, and then click the OPTIONS button to display the short-cut menu.
2. Click FREE NIGHTS on the short-cut menu to display the Free Nights screen.
3. Select the free night record whose usage you want to view and click the USAGE button.

The Free Night Usage screen is displayed.

Name	Date	Day of week	Arrival	Departure	Price
Aceti, Ralph	07/09/11	Wednesday	07/09/11	08/09/11	92.00 ...

Reservation Details		Guest Recognition	
Name	Mr. Ralph Aceti ↻	VIP	VIP 1
Reservation No.	2933 ↻	Indicators	
Arrival	Wednesday, 07.09.2011	Address	534 N Tallyrand Street 76206 Wichita TX
Departure	Thursday, 08.09.2011	First Arrival	27/07/11
Nights	1	Last	08/08/11
Rooms	1 Double Room	Departure	
Room No.		Stays	↻ 2
No of Pers	1 Adult	Last	204 150.00 EUR
Rate	RACK 0.00 EUR	Room/Rate	
Code/Price		Total	1,785.45 EUR
Packages	Breakfast included (Inclusive), Newspaper (Financial Times/HT) (Separate)	Revenue	
Open Balance	0.00	Notes for Profile	BIL: Always fax and phone charges to a separate invoice a/c AVAYA
Market Code	Individual	Notes for Reservation	

Note: The USAGE button is only available if the selected free night has been linked to a reservation.

-  Free nights functionality is controlled by the parameter FREE NIGHTS under Setup → Configuration → Global Settings → Reservation 2 tab.
-  Free nights functionality is controlled by the user right CREATE FREE NIGHTS under Setup → Configuration → Users → User Definition → Rights → Reservation.
-  Assigning, viewing and maintaining the free nights linked to a guest profile is controlled by the user right CREATE FREE NIGHTS under Setup → Configuration → Users → User Definition → Rights → Reservations.
-  The rebate cards membership scheme which is controlled by the license code MEMBERSHIP REBATE HANDLING also uses free nights functionality.

Virtual Numbers

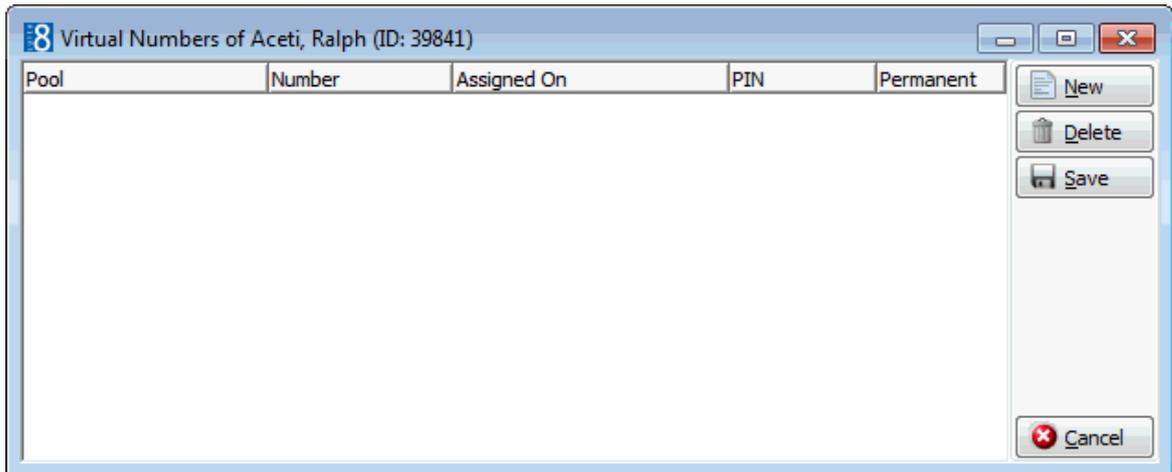
Virtual numbers serve the guest as the guest's private line once they check in until they check out. Virtual numbers can be assigned permanently to an individual guest profile. Once a virtual number has been linked to a profile it is marked as permanent and cannot be used for another assignment.

Note: The use of Virtual numbers and the available functionality depends entirely on the capabilities and the feature set of the external system and the interface used in the hotel.

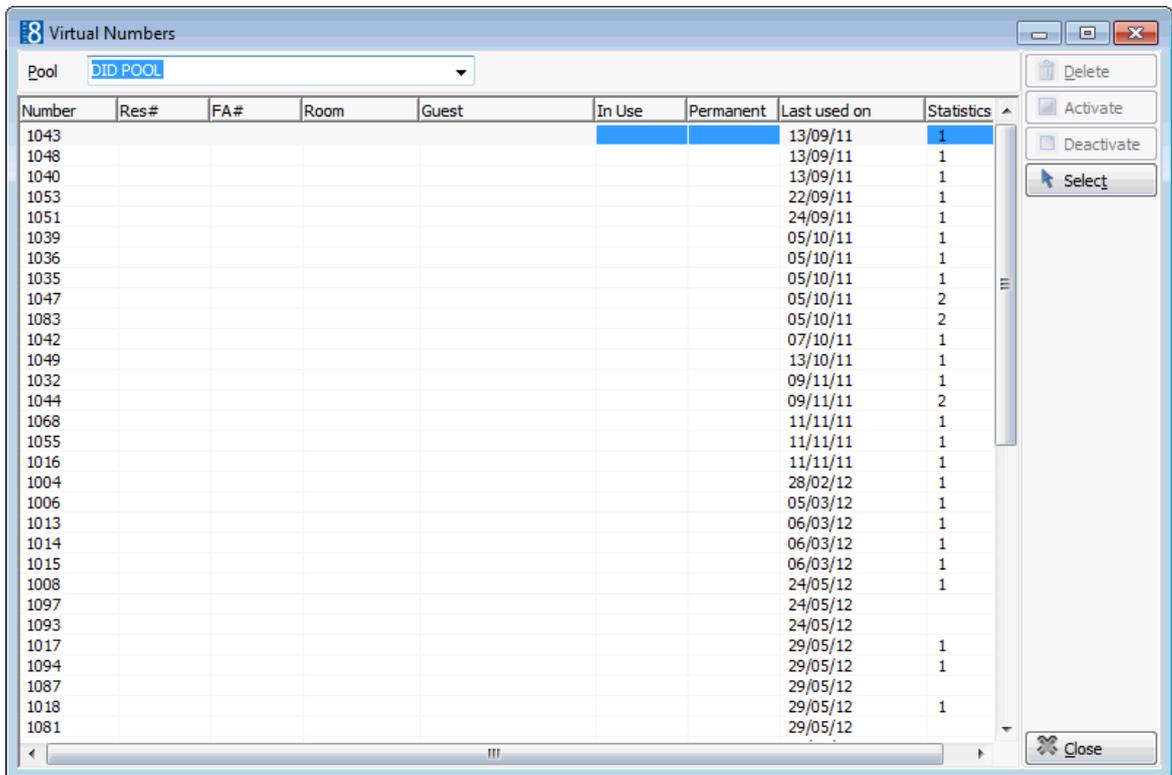
How to assign a virtual number

1. Click the CUSTOMER RELATIONS menu and select PROFILES.
2. Search for and select the required profile, then select VIRTUAL NUMBERS from the OPTIONS menu of the profile navigator.

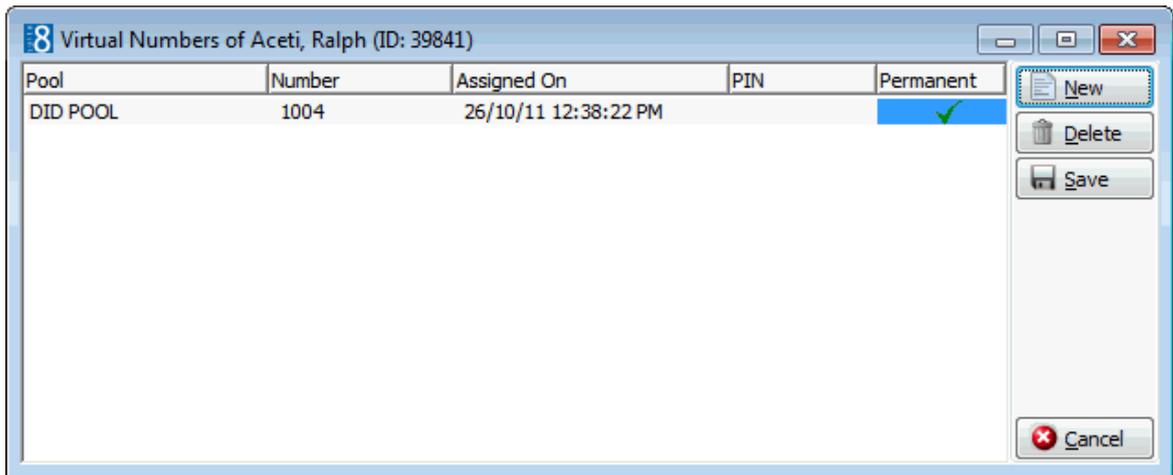
The Permanent Assignments dialog box is displayed.



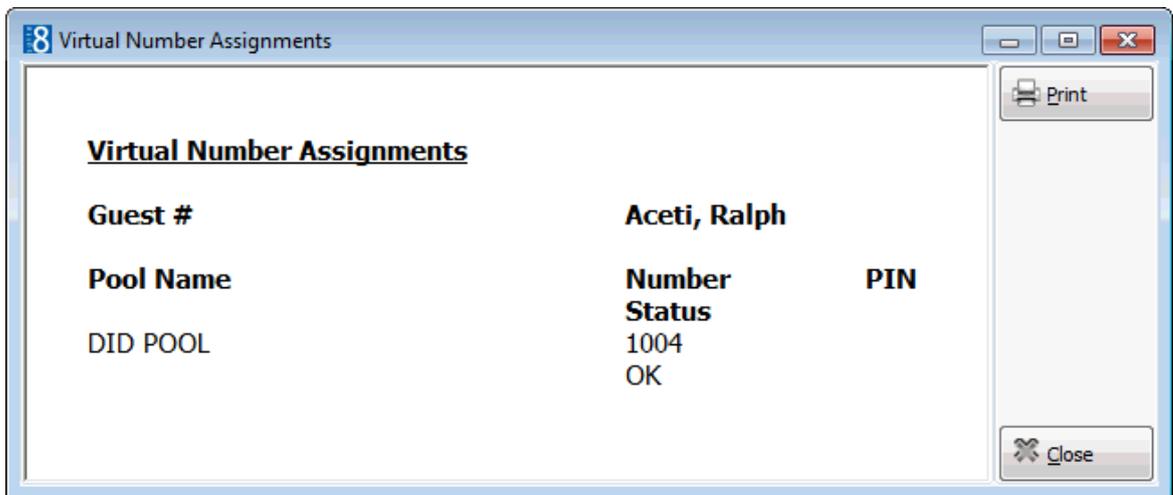
3. Click NEW to assign a new virtual number, the Virtual Numbers screen is displayed.



4. Click the POOL drop-down arrow and select the required virtual number pool.
5. Press the TAB button to update the list of numbers belonging to the selected pool.
6. Select a virtual number and click the SELECT button, the Permanent Assignments dialog box appears with the virtual number assigned.



- Click SAVE to close the dialog box and save the assigned number.



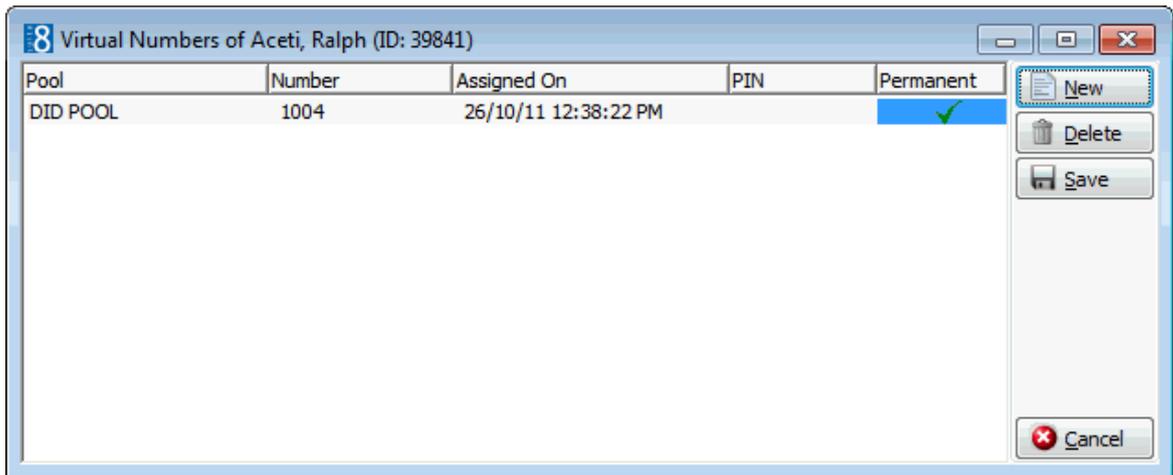
- Click CLOSE to close the virtual numbers assignment dialog box.

Note: Only one number per pool can be assigned permanently to a guest.

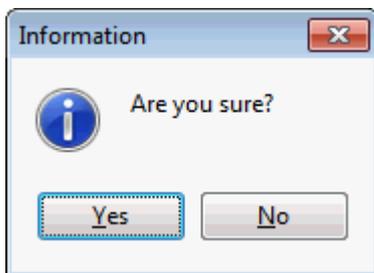
How to delete a virtual number assignment

- Click the CUSTOMER RELATIONS menu and select PROFILES.
- Search for and select the required profile, then select VIRTUAL NUMBERS from the OPTIONS menu of the profile navigator.

The Permanent Assignments dialog box is displayed.



3. Select the virtual number assignment to be deleted and click the DELETE button, a confirmation message is displayed.



4. Click YES to delete the virtual number assignment.
5. Click SAVE to close the dialog box.

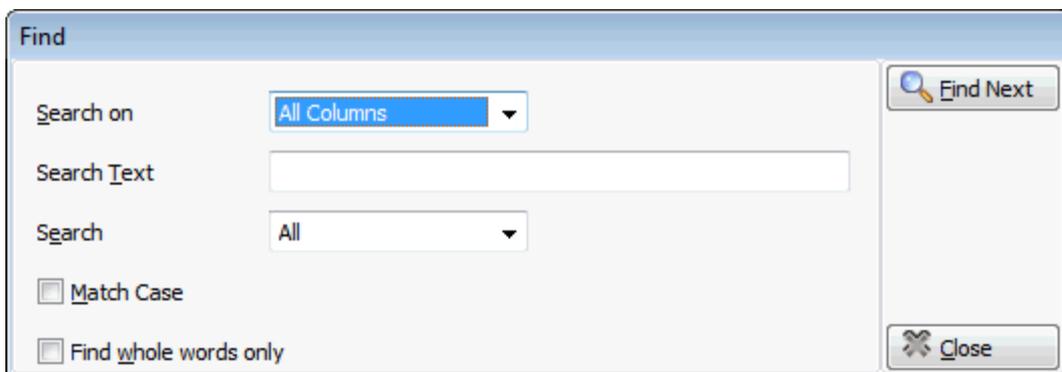
Find in Grid

Once the search has been performed on the profile navigator the search can be further narrowed by using the Find in Grid functionality.

How to use the Find in Grid functionality

1. On the profile search screen search for the required profiles and then select FIND IN GRID from the OPTIONS menu of the profile navigator.

The Find dialog box is displayed.



2. The **Find in Grid** options allow the user to:
 - Search on all or specific columns within the grid.
 - Search for specific text.
 - Control the direction of the search.

- Match the case or search for whole words only.
3. Once the search criteria have been defined click the FIND NEXT button.
The first profile matching the criteria is highlighted in the grid; click FIND NEXT to locate the remaining profiles matching the selection criteria.

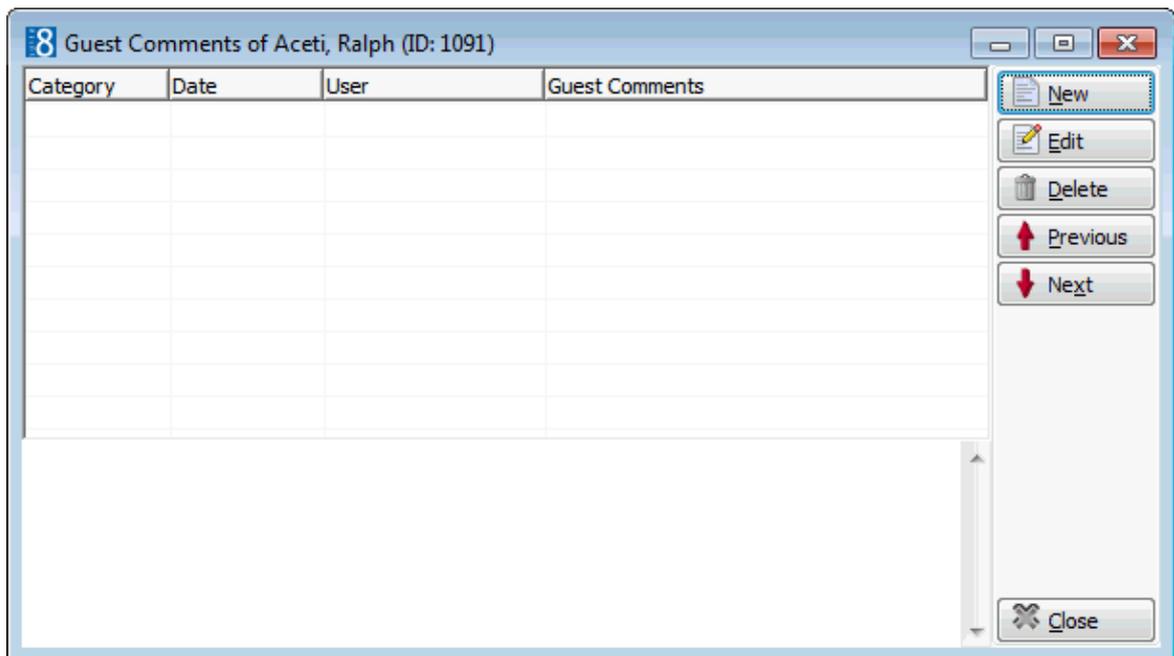
Guest Comments

This option may be used to enter guest comments during the guest's stay. In addition to guest comments and complaints, information from guest questionnaires can also be entered. There is no limit as to the number of guest comments that can be entered, the guest comments are displayed in descending date order and the PREVIOUS and NEXT buttons can be used to easily move between the different comments. Indicators on the guest comment grid category grid differentiate between profile, reservation and meeting planner comments. Guest comments are also viewable from room history.

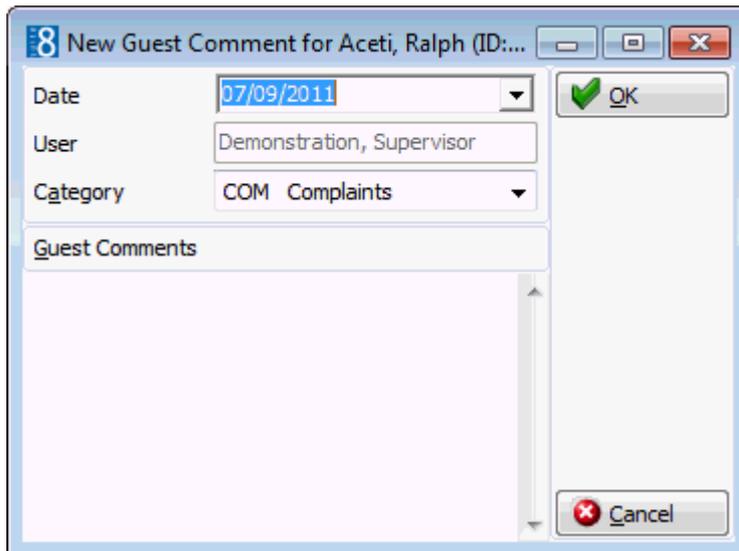
How to enter a new guest comment

1. Search for and select the required profile, then select GUEST COMMENTS from the OPTIONS menu of the profile navigator.

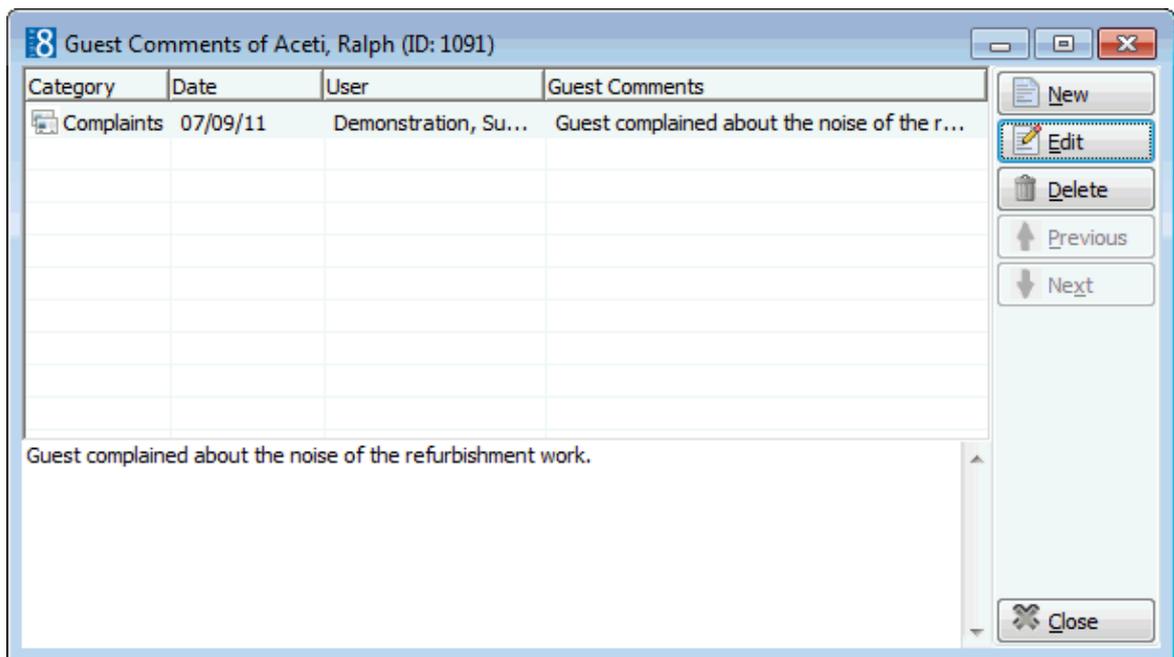
The Guest Comments screen is displayed.



2. Click the NEW button to display the Guest Comments dialog box.



3. Type the date of entry for the comment in the DATE box **or** click the drop down arrow and select a date from the calendar.
4. The USER box defaults to the signed on user.
5. In the CATEGORY box select the category to which this type of comment belongs.
6. In the GUEST COMMENTS box enter the guest comment.
7. Click OK, the new comment is displayed on the Guest Comments list.



How to edit a guest comment

1. Search for and select the required profile, then select GUEST COMMENTS from the OPTIONS menu of the profile navigator.
The Guest Comments screen is displayed.
2. Select the guest comment to be edited and click the EDIT button to display the Guest Comments dialog box.

Depending on the category of comment additional information indicating the reservation or conference booking the comment belongs to may be displayed:

- Reservation Comments - the reservation ID and the arrival and departure dates are displayed.
- Meeting Planner Comments - the booking ID, arrival and departure dates and conference status/room status

The screenshot shows a dialog box titled "Edit Guest Comment for Aceti, Ralph (ID: ...)". It contains the following fields and controls:

- Date:** A date picker showing "07/09/2011".
- User:** A text field containing "Demonstration, Supervisor,".
- Category:** A dropdown menu showing "COM Complaints".
- Guest Comments:** A text area containing the text "Guest complained about the noise of the refurbishment work".
- Buttons:** "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

3. Make any changes necessary.
4. Click OK to save the changes.

How to delete a guest comment

1. Search for and select the required profile, then select GUEST COMMENTS from the OPTIONS menu of the profile navigator.
The Guest Comments screen is displayed.
2. Select the guest comment to be deleted and click the DELETE button, a confirmation message is displayed.

The screenshot shows a "Confirmation" dialog box with a question mark icon. The text inside reads: "Are you sure, you want to delete guest comment?". Below the text are two buttons: "Yes" and "No".

3. Click YES to delete the guest comment.

- ❗ Guest Comments categories are defined via the option GUEST COMMENTS under Setup → Configuration → CRM.

Correspondence Lookup

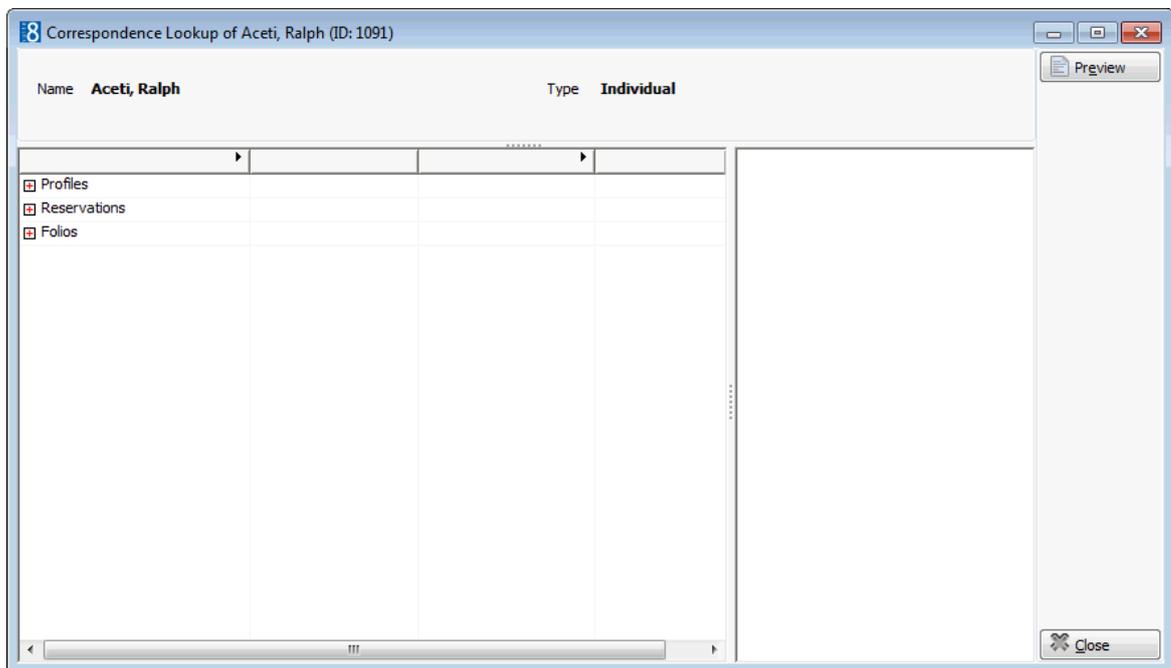
This option is used to view all types of correspondence which are linked to the profile from:

- Profiles
- Tasks & Activities
- Reservations
- CCM Bookings
- Folios
- Accounts Receivable

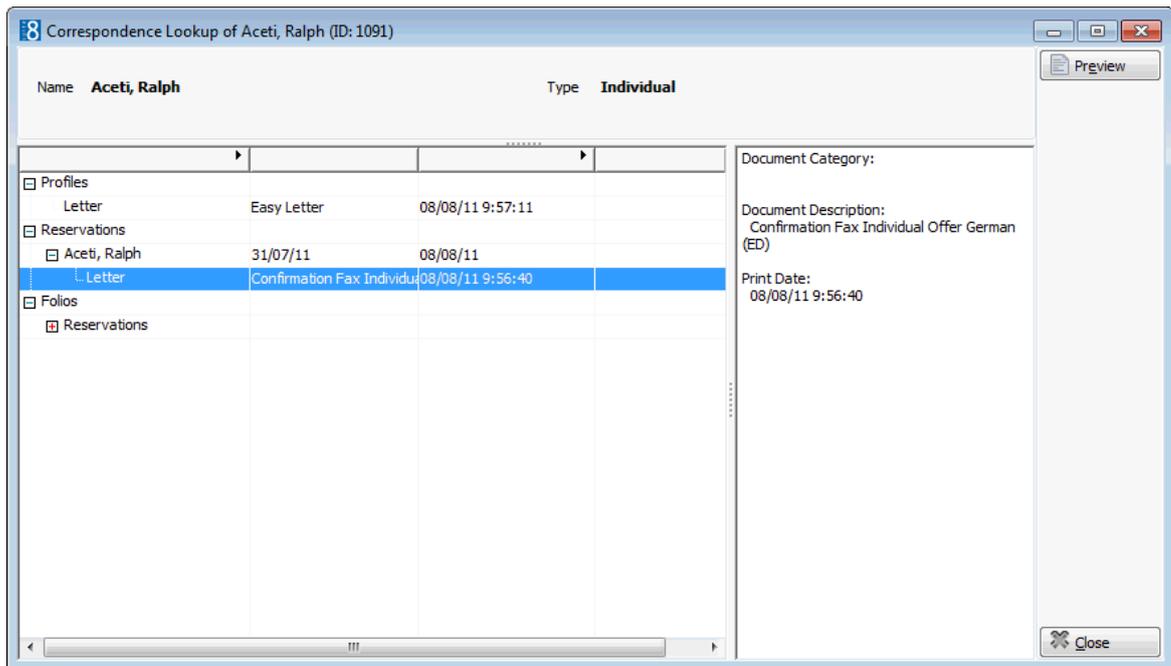
How to access correspondence lookup

1. On the profile search screen select the required profile.
2. Select CORRESPONDENCE LOOKUP from the OPTIONS menu of the profile navigator.

The correspondence Lookup dialog box is displayed.



3. Select the category and click the plus sign to expand the list of available correspondence.



4. Select the document required and click the PREVIEW button to view the folio, confirmation or profile letter.

Actions

This option allows the user to apply certain actions to multiple profiles. Attributes (marketing information) can be assigned or removed, profiles can be set as active or inactive and the no mailing flag can be activated or deactivated. Profiles with active tasks & activities, reservations, bookings, financial accounts etc. cannot be set to inactive.

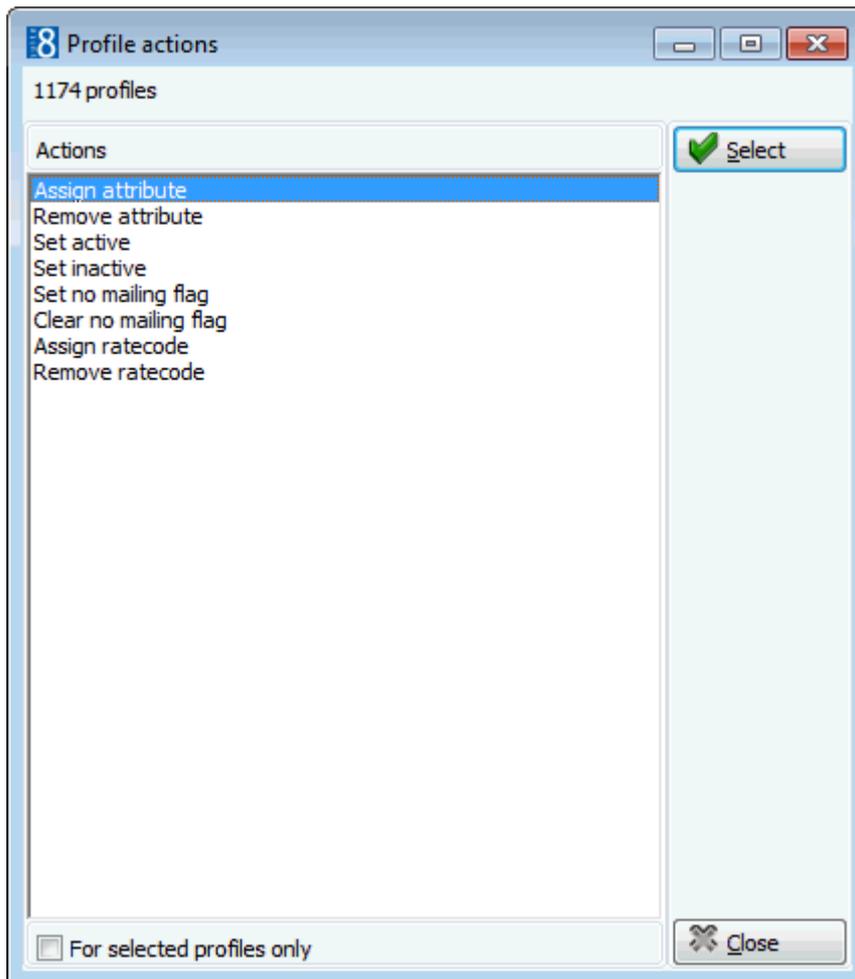
This can be run for all the profiles currently listed in the grid or by marking only the profiles required.

The actions available are:

- Assign attribute
- Remove attribute
- Set active
- Set inactive
- Set no mailing flag
- Clear no mailing flag
- Assign ratecode
- Remove ratecode

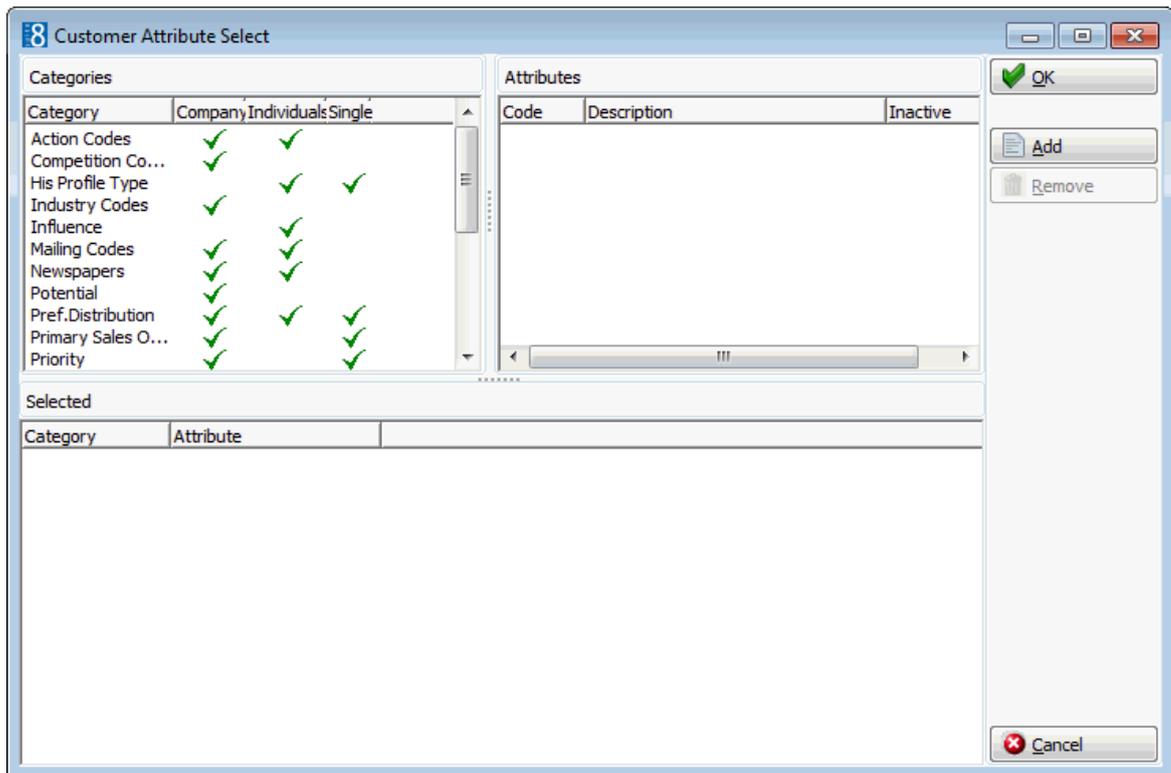
How to assign an action

1. Click the CUSTOMER RELATIONS menu and select PROFILES to display the Customer Profiles screen.
2. On the profile search screen use the query options to list the profiles required.
On the profile list the selection can be further reduced by marking the profiles required.
3. Select ACTIONS from the OPTIONS menu of the profile navigator.
The profile actions dialog box is displayed.

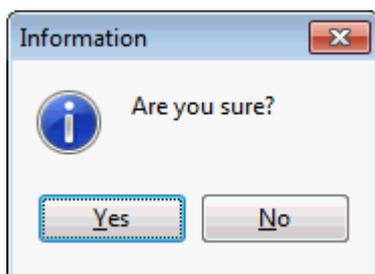


4. Select the check box FOR SELECTED PROFILES ONLY if the action should be only for the selected profiles and not for all profiles listed in the grid.
5. Select the required action and click the SELECT button.

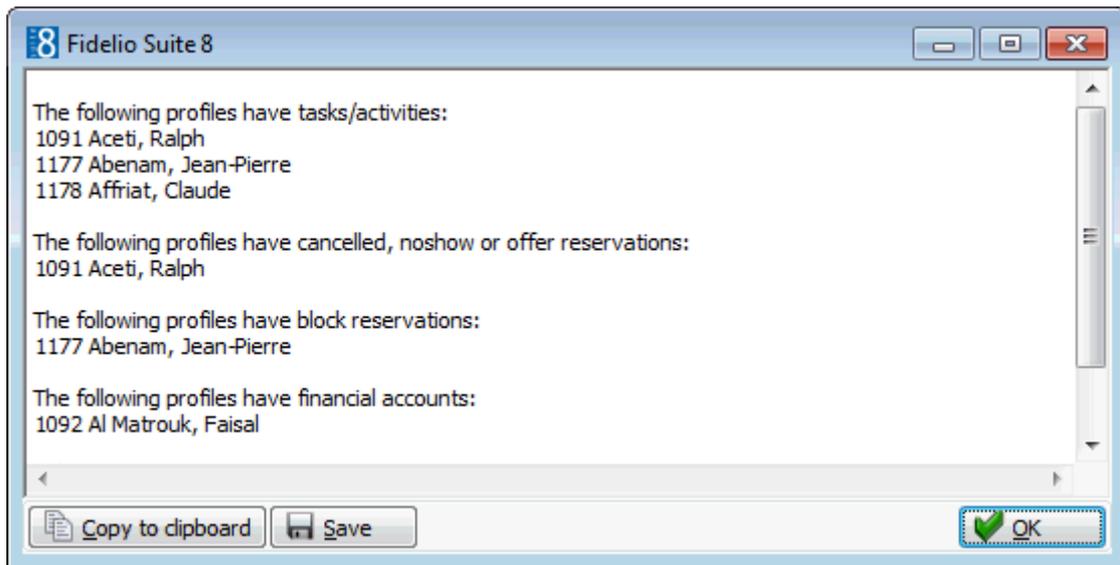
If the action ASSIGN ATTRIBUTE or REMOVE ATTRIBUTE is selected then the Customer Attribute Select dialog box is displayed.



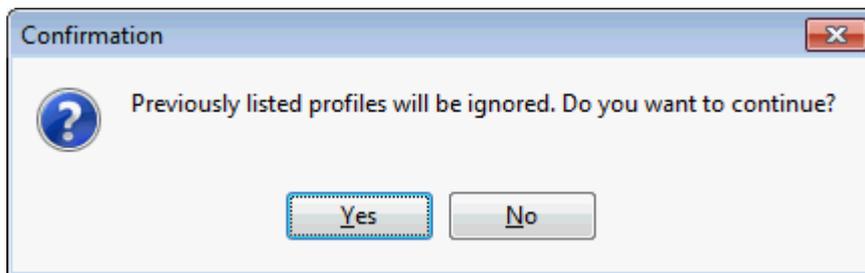
6. Select the attribute category from the CATEGORIES list and then select the attribute from the ATTRIBUTES list displayed on the right.
7. Click ADD to list the action in the lower window.
 - If the attribute being added is from a single select category, then on the profile an already existing attribute for that category will be replaced by the new attribute.
 - If the attribute being added is from a multi-select category, then on the profile it will be listed in addition to any already existing attributes for that category.
 - If the attribute category is multi-select then multiple actions can be added to the lower window.
8. Click OK, a message is displayed asking you to confirm the action.



9. Select YES, the profile action dialog box is re-displayed.
10. If the action SET ACTIVE or SET INACTIVE is selected then a message is displayed asking you to confirm the action.
11. Select YES, the relevant confirmation message is displayed indicating that the 'Active Flag is Set' or the 'Inactive flag is set'.
12. If the action SET INACTIVE was selected and there are profiles that cannot be set to inactive, then the profiles are listed along with the reason that they cannot be set inactive.



13. Click OK, a message asking if you want to continue with the remaining profiles is displayed.



14. If the action SET NO MAILING FLAG or CLEAR NO MAILING FLAG is selected then a message is displayed asking you to confirm the action.
15. Select YES, the relevant confirmation message is displayed 'No Mailing flag is set' or 'No Mailing flag is cleared'.
16. Click OK to close the confirmation message screen.
17. Click CLOSE to close the Profile actions dialog box.

 Actions functionality is controlled by the user right ACTIONS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles.

 The relevant actions are displayed in the user log if PROFILE NEW MARKETING INFO., PROFILE ACTIVE FLAG CHANGED and PROFILE NOMAILING FLAG CHANGED are selected in Setup → Configuration → Users → User Log → Customer Management.

Passport & ID Card Scan

Passports and ID cards can be scanned from the reservations options menu, from the customer profiles options menu and when editing a profile on the more fields tab when selecting 'New' button on the personal document section.

 The Fuji-fi-60F Passport scanner options are configured via the section FUJI-FI-60F PASSPORT SCANNER under Setup → Configuration → Global Settings → Profile → Profile 2 tab.

Partner HTMLs

When searching for profiles, this option may be used to display the profile html file located at partner hotels.

How to display the HTML files of partner hotels

1. Click the CUSTOMER RELATIONS menu and select PROFILES to display the Customer Profiles screen.
2. On the profile search screen use the query options to locate the profile required.
On the profile list the selection can be further reduced by marking the profiles required.
3. Select PARTNER HTMLs from the OPTIONS menu of the profile navigator.
All connected partner hotels, including the master and the local hotel will then be searched and if a hotel has that profile, then it is added to the list.
4. The local profile html file from each hotel is displayed when the property is selected from the list.



Partner HTML's requires the licence HOTEL CONNECTOR PROFILE AND STATISTICS under Setup → License → V8 Sublicences → Software interfaces.

Merge with another profile

This option may be used to merge profiles of the same type. That is, you can merge two individual profiles or two company profiles, but not an individual and a company profile.

When you choose a profile and merge another with it, the revenue data, stay details and marketing information of two profiles are merged into one and the second profile is marked as inactive in the database.

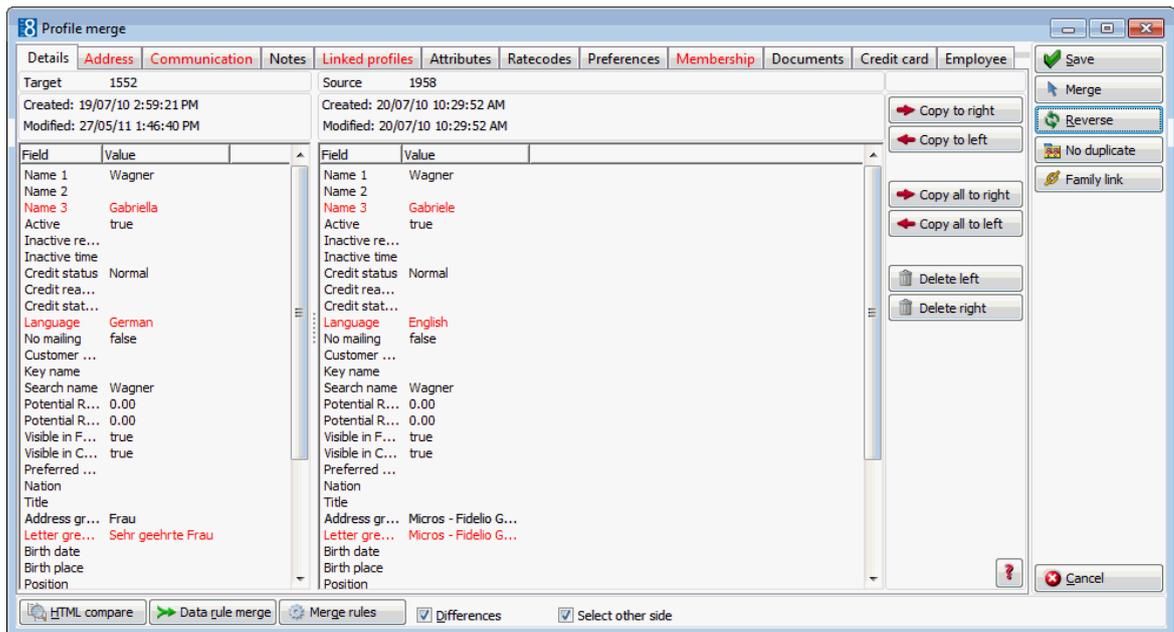
The profiles are listed as the Target profile and the Source profile:

- Target - the target profile is on the left and this is where the information is being transferred to.
- Source - the source profile is on the right and this is where the information is being transferred from.

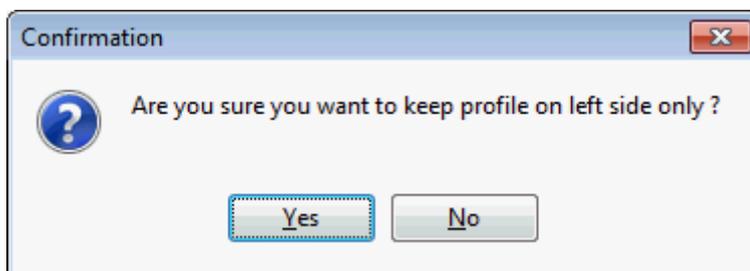
When the profiles are merged the profile on the left is kept and the profile on the right is marked as inactive. The reverse button allows you to switch the location of the profiles if required.

How to merge with another profile

1. Click the CUSTOMER RELATIONS menu and select PROFILES to display the Customer Profiles screen.
2. Search for and select the profile to be merged, and then select MERGE WITH ANOTHER PROFILE from the OPTIONS menu of the profile navigator.
The Profile Search screen is displayed.
3. Search for and select the profile to be merged to and click SELECT.
The Profile merge screen is displayed with the target profile is listed on the left and the source profile on the right.

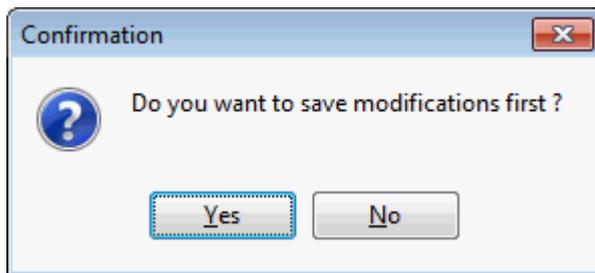


4. The DETAILS tab is displayed by default and all other tabs containing data are highlighted. Profile details which are different are by default marked in red. The detail differences between the profiles can be displayed in red or black by selecting the DIFFERENCES check box.
5. The options to copy and delete data from either profile are as follows:
 - > Copy to right - copies specific details from the profile on the left to the profile on the right.
 - < Copy to left - copies specific details from the profile on the right to the profile on the left.
 - > Copy all to right - copies all details from the profile on the left to the profile on the right.
 - < Copy all to left - copies all details from the profile on the right to the profile on the left.
 - Delete Left - deletes the selected data from the profile on the left.
 - Delete Right - deletes the selected data from the profile on the right.
4. Copy the details from one profile to the other as required using the options detailed above.
5. Once all the details have been copied to the profile which is being kept, click the MERGE button to merge the profile details. A confirmation message is displayed asking if you are sure you want to keep the profile on the left side only?



Note: If the profile on the right should be kept then click the reverse button , the profile on the right moves to the left and becomes the target profile.

- Click YES to merge the profiles, a message is displayed asking if the modifications should be saved first.

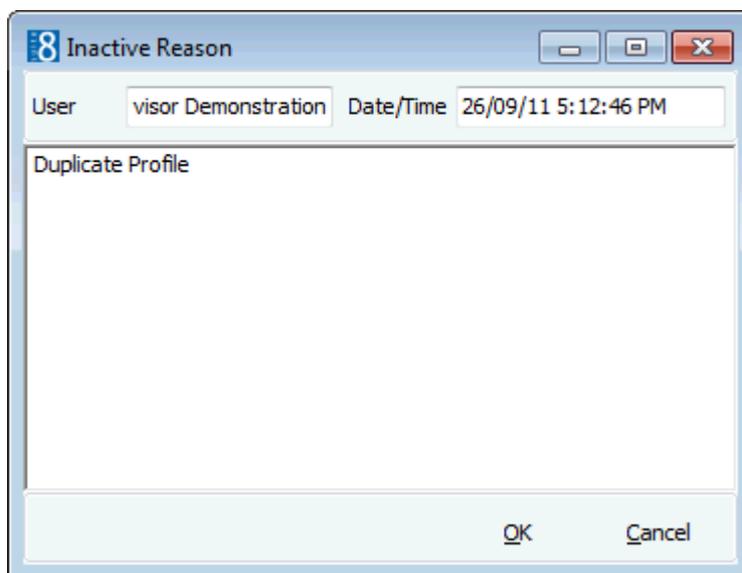


- Click YES to save the modifications, a message is displayed confirming that the profile merge was successful.



- Click OK, the profile merge screen is closed.

Note: When merging profiles the old profile is marked as inactive, but remains in the system. When selecting the inactive profile, the profile to which the inactive profile was merged will be shown when accessing the **Inactive Reason** on the profile tab.



Profile Merge Options

Button	Definition
HTML compare	Compares the profile in HTML format as opposed to the main list format.
Data rule merge	Allows you to merge the profiles according to the rules defined under the option MERGE RULES.

Merge rules	Defines the rules for merging. Per field the options are to ignore and not merge the fields or to copy and merge the fields.
Differences	Displays the differences between the two profiles in red.
Select other side	
Save	Saves any changes made to either of the profiles.
Merge	Click this button to start the merge. The confirm message to save the changes will automatically appear when clicking the merge button.
Reverse	Switches the profiles from the left to the right hand side and vice versa.
No duplicate	Marks the profiles as not being duplicates.
Family link	Allows you to link the profiles with a family role.

Merge Rules

This option is used to set the merge rule for each available field in the profile.

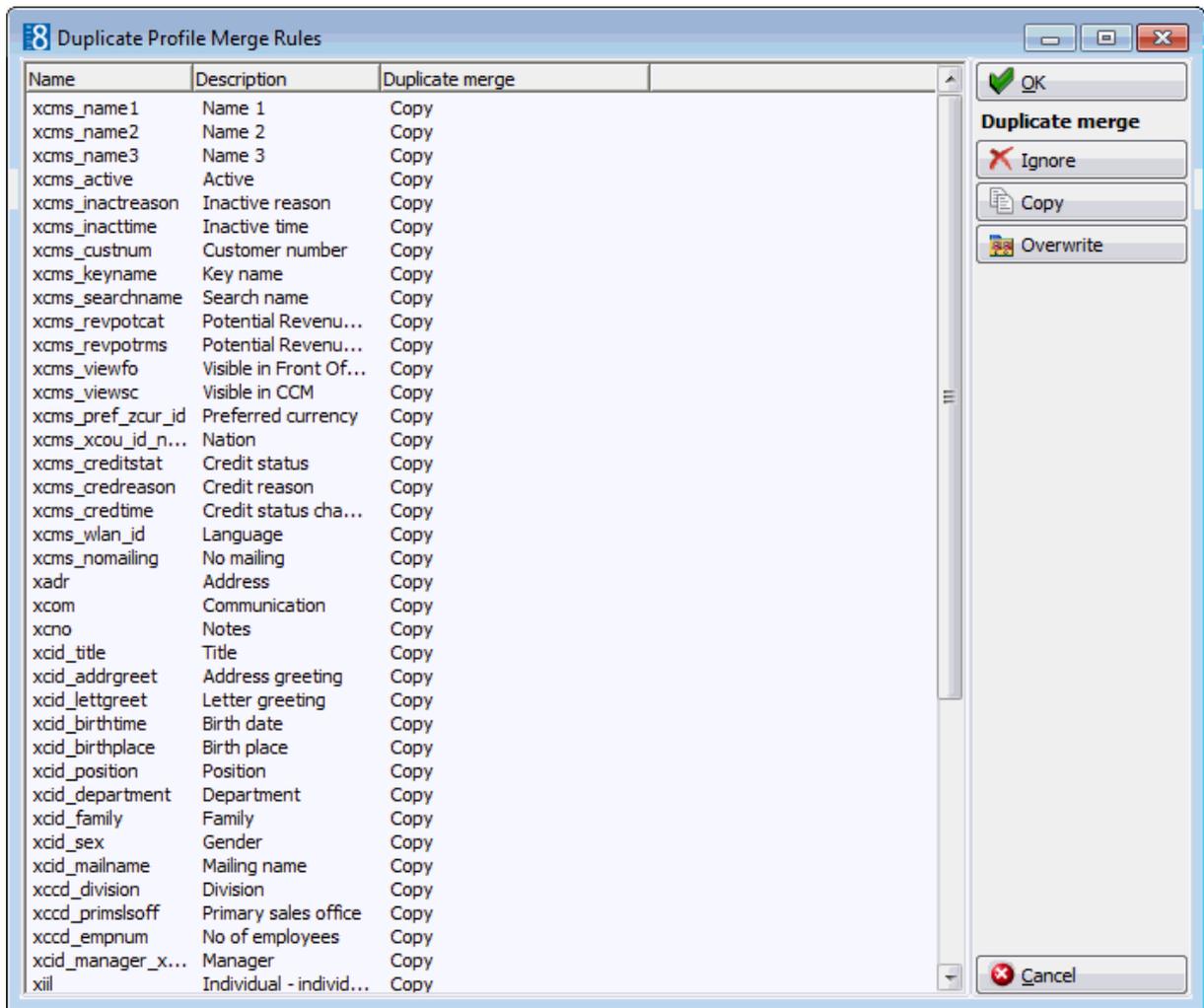
A field value can be set to **IGNORE** or **COPY**.

- If the value is set to **IGNORE** then the field keeps its original value during the merge process, i.e. the field value from the other profile is not copied to the target profile.
- If the value is set to **COPY** then the field will be updated during the merge process, i.e. the field value from the other profile will be copied to the target profile.

How to set the merge rules

Select the fields to be ignored during the profile merge and click **IGNORE**, the Duplicate merge value is set to **Ignore**.

Select the fields to be copied during the profile merge and click **COPY**, the Duplicate merge value is set to **Copy**.



Note: When merging two company profiles where both have a primary contact, the contact information is transferred, however the contact of the target profile is selected as the primary contact and the check mark for the primary contact on the source profile is removed.

Save List of Profiles

This option allows you to save the profiles currently listed in the profile navigator grid. This means that you can use the search criteria to produce a list of profiles and then save this list so that the next time you need this specific list you can just load the list without having to enter all the search criteria.

Load list of profiles

This option allows you to load a list of previously saved profiles. This means that you can use the search criteria to produce a list of profiles and then save this list so that the next time you need this specific list you can just load the list without having to enter all the search criteria.

Custom SQL Statements

Custom SQL statements can be created for profile search purposes. The custom queries are listed in the advanced query option in the profile search navigator. Custom SQL queries can also be run in combination with other search criteria entered on the profile search navigator.

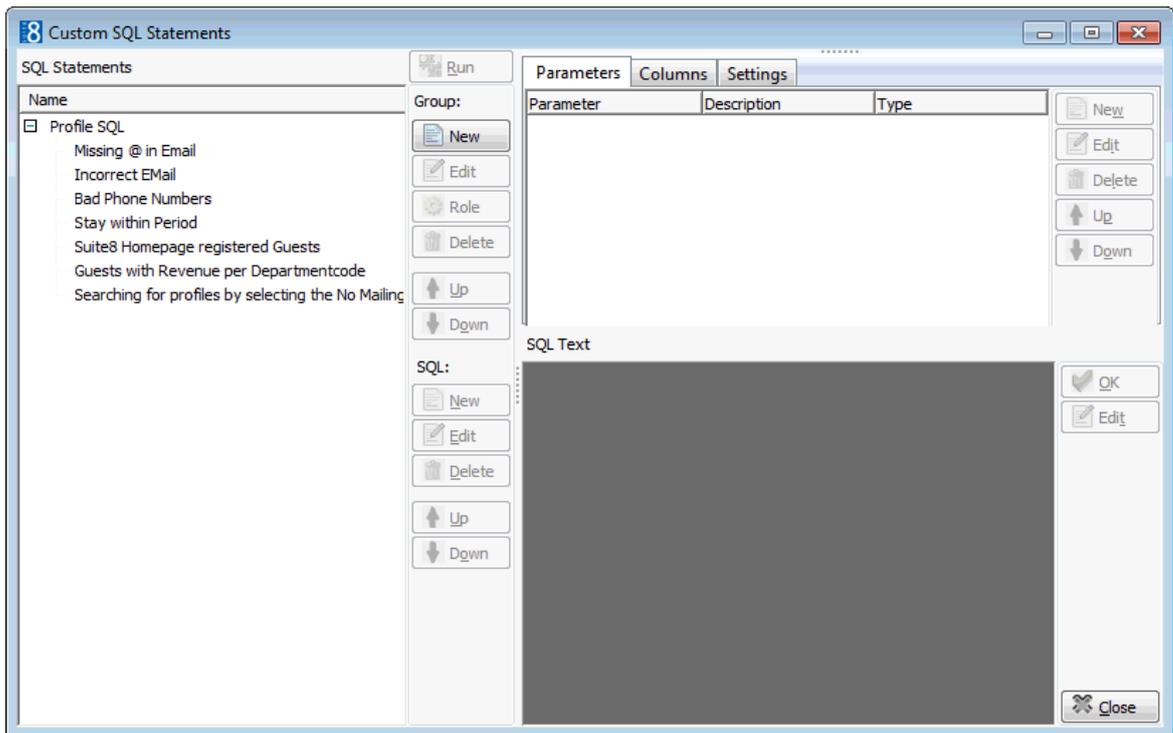
Custom SQL statements may be defined via:

- Customer Relations → Profiles → Profile Navigator → Options button
- Setup → Miscellaneous → System Maintenance → Database

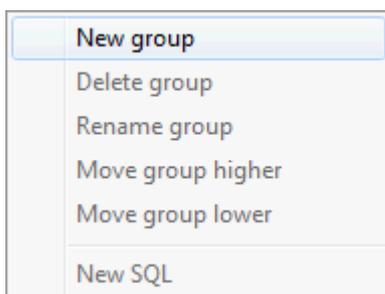
How to create a custom SQL group

1. On the profile search screen click the OPTIONS 2 button to display the short-cut menu.
2. Click CUSTOM SQL STATEMENTS on the short-cut menu to display the Custom SQL Statements dialog box.

Note: A Custom SQL group must be created before any custom SQL statements can be created.



3. Place the cursor in the SQL Statements panel on the left-hand side of the screen and right-click to display the short-cut menu.



4. Click NEW GROUP on the shortcut menu to display the Custom SQL group name dialog box.



- In the CODE box enter a code for the SQL group, up to five alphanumeric characters is allowed.
- In the DESCRIPTION box, enter the description of the SQL group.

The screenshot shows a dialog box titled "Custom SQL Group Name". It has two input fields: "Code" with the value "CRM" and "Description" with the value "CRM Custom SQL Statements". On the right side, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

- Click OK to save the SQL Group.

How to link a role to a custom SQL group

- Click MISCELLANEOUS from the SETUP drop-down menu and then SYSTEM MAINTENANCE.
- On the System Maintenance menu click DATABASE
- Click CUSTOM SQL STATEMENTS on the Database menu to display the Custom SQL statements dialog box.

Note: A Custom SQL group must be created before any custom SQL statements can be created.

- Select the required SQL Group from the SQL Statements panel on the left-hand side of the screen.
- Click the ROLE button.

The screenshot shows a dialog box titled "Custom SQL group role". On the left, there is a dropdown menu currently showing "None". The dropdown is open, displaying a list of options: "None", "Profile search", "Reservation search", "Room search", and "Custom sql grid". On the right side, there are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

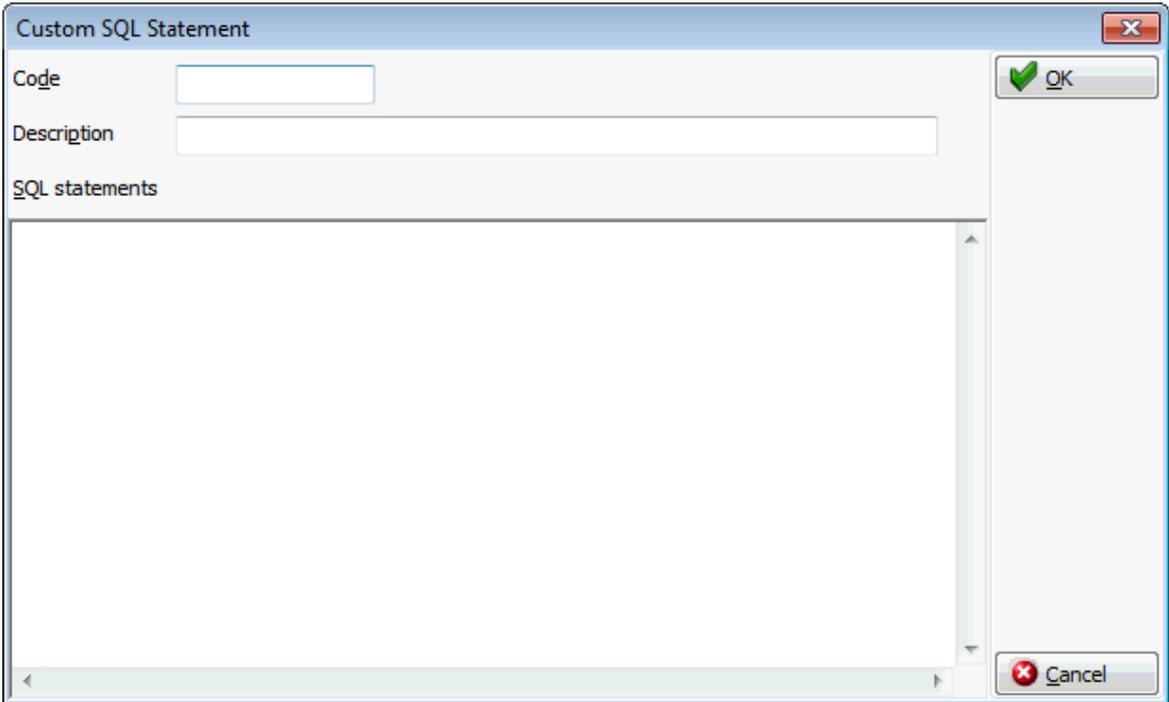
- Select where in the application the statements from the selected group should be available: Profile search, Reservation search, Room search or on the Custom SQL grid.
- Click OK to save the SQL Group Role assignment.

How to create a custom SQL statement

1. On the profile search screen click the OPTIONS 2 button to display the short-cut menu.
2. Click CUSTOM SQL STATEMENTS on the short-cut menu to display the Custom SQL statements dialog box.

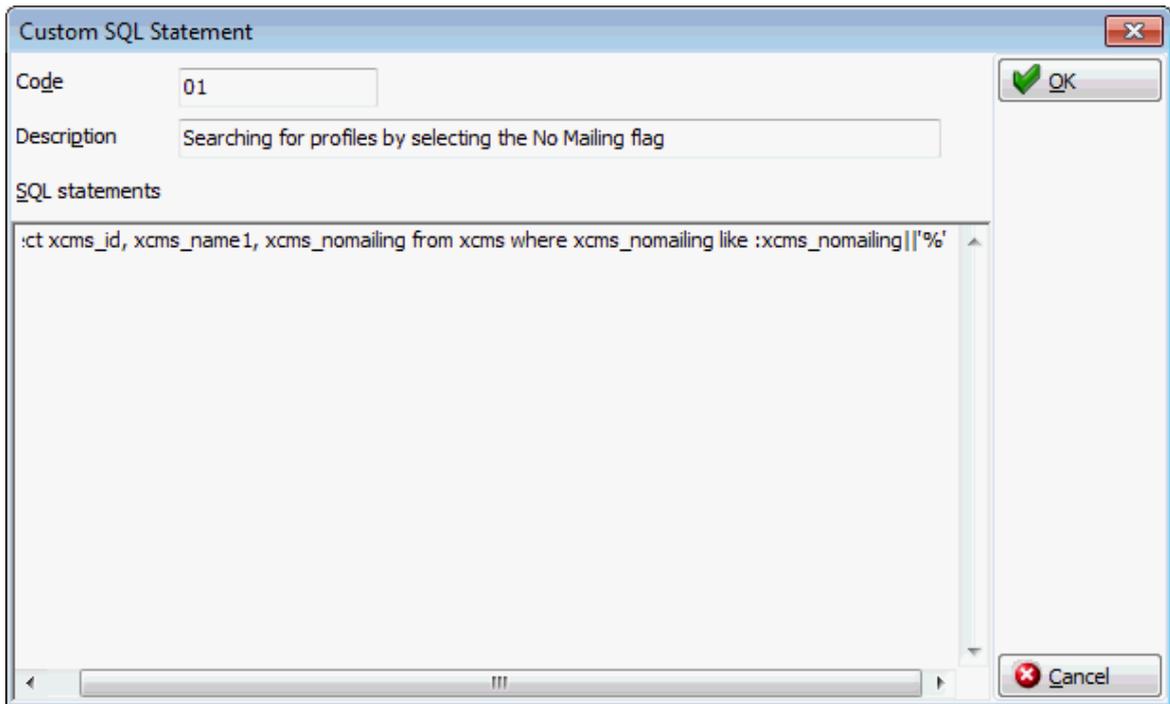
Note: A Custom SQL group must be created before any custom SQL statements can be created.

3. Select the SQL Statements group from the panel on the left-hand side of the screen and click NEW to display the Custom SQL Statement dialog box.

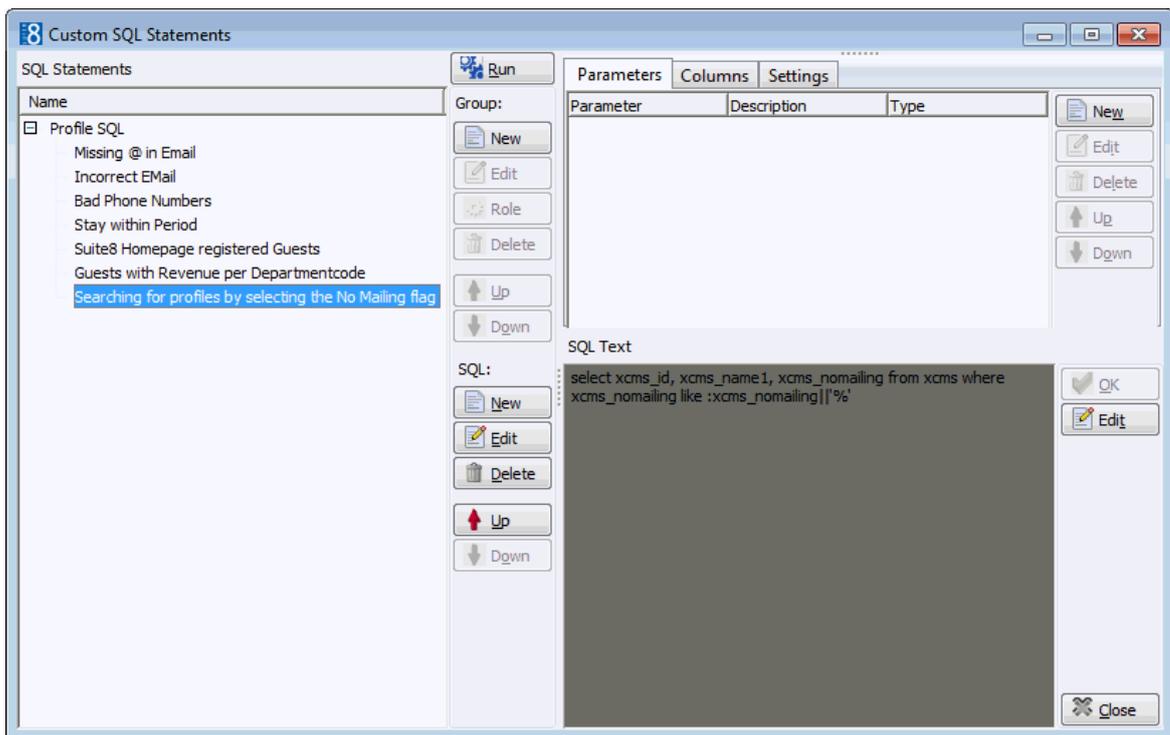


4. In the CODE box enter a code for the SQL statement, for example 01.
5. In the DESCRIPTION box, enter the description of the SQL statement, for example SEARCHING FOR PROFILES BY SELECTING THE NO MAILING FLAG.
6. In the SQL STATEMENTS panel enter the SQL statement, for example:

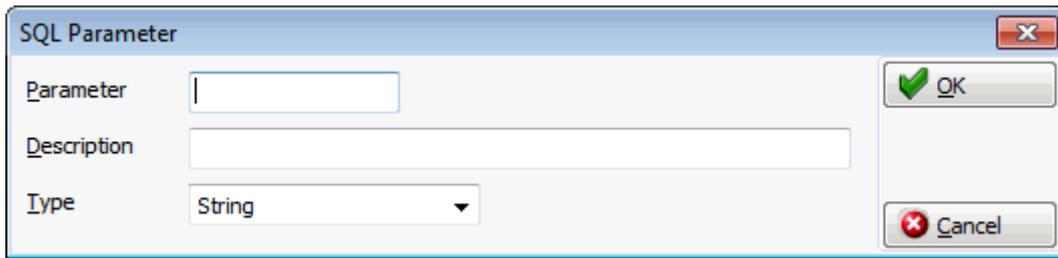
```
select xcms_id, xcms_name1, xcms_nomailing from xcms where xcms_nomailing like :xcms_nomailing||'%'
```



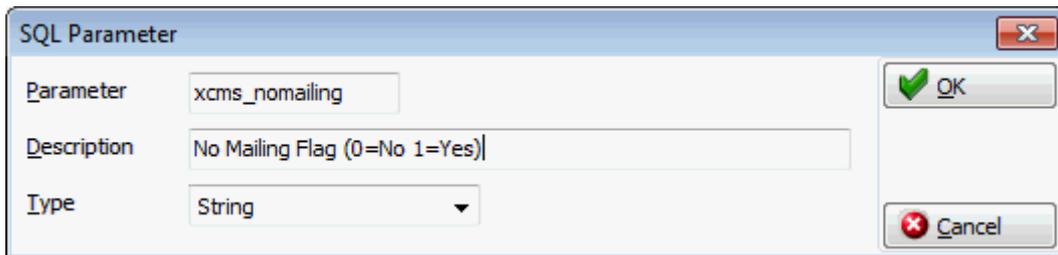
7. Click OK, the custom SQL statement is listed in the SQL statements panel.
8. Selecting the statement description displays the SQL statement in the SQL text panel in the lower right-hand side.



9. If the SQL statement requires input from the user then this can be done via PARAMETERS.
10. Select the required SQL Statement and in the Parameters panel click NEW to display the SQL parameter dialog box.



11. In the PARAMETER box enter the SQL parameter, for example XCMS_NOMAILING (max 20 characters).
12. In the DESCRIPTION box, enter the text which should appear when the user runs the SQL statement, for example NO MAILING FLAG (0=No 1=YES).
13. In the TYPE box select the type of expression.



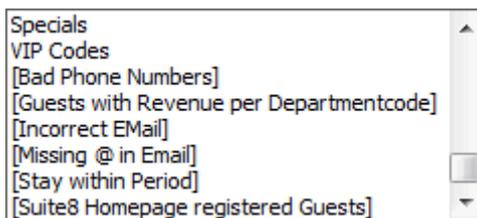
14. Click OK to close the SQL parameter dialog box.
15. Click the CLOSE button to close the Custom SQL statements screen.

The profile search screen is re-displayed.

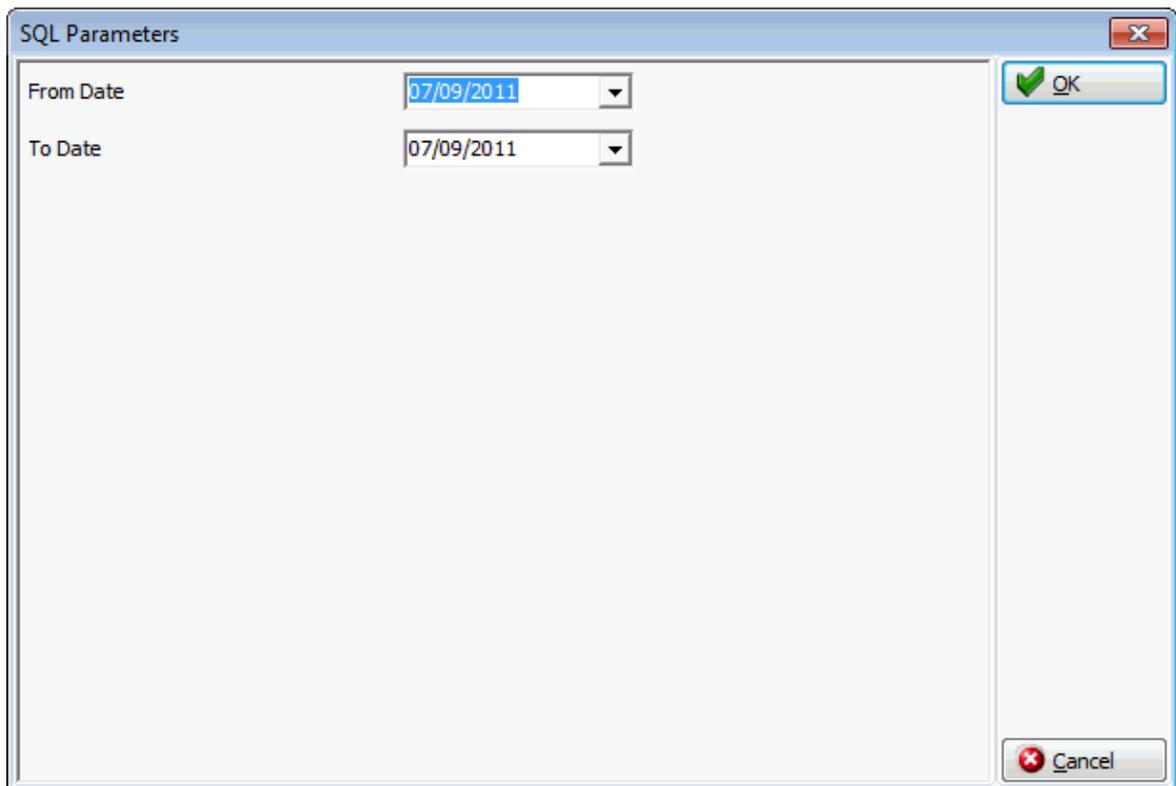
How to run a custom SQL statement

1. On the profile search screen click the down arrow on the ADV. QRY. box and select the required custom SQL statement.

Custom SQL Statements are listed at the end of the selection box and are enclosed in brackets [].



2. Click the FULL SEARCH button; if the query contains a parameter then this will be displayed in the form of a question for the user to answer.



3. Complete the question and click OK

All profiles matching the query are displayed.

Note: The custom SQL query list is kept when editing a profile and pressing the OK button to return to the query list.

-  In order to define or use custom SQL statements a custom SQL group must be created with the role PROFILE SEARCH via the option CUSTOM SQL STATEMENTS under Setup → Miscellaneous → System Maintenance → Database.
-  Custom SQL statement functionality is controlled by the user right CUSTOM SQL STATEMENTS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles.

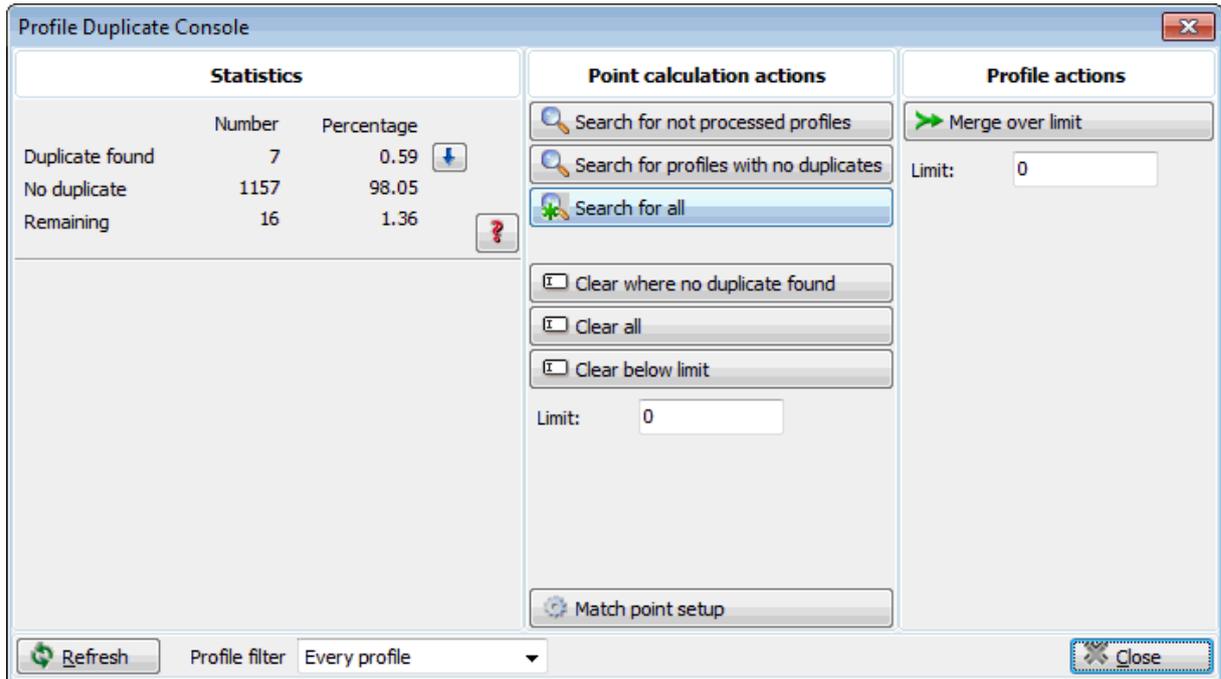
Duplicates

Duplicate functionality is used to find, match and merge duplicate profiles.

Use advanced query to enter selection criteria and click the DUPLICATE button to access the duplicate console or select duplicate console without filtering profiles. The selection criteria dialog box for the duplicate console appears:

- Duplicate Console - displays the duplicate console.
- View last merged profile - only available after a profile has been merged. Allows the last merged profile to be viewed in HTML format.
- Pot Duplicate - select this option to view the sub grid with potential duplicate profiles.

Duplicate Console



Duplicate console dialog box

Field	Definition
Statistics	This section lists the profiles and percentage to the total number of profiles found for possible duplicates
Duplicate found	The number and percentage of profiles considered as possible duplicates
No duplicate	The number of profiles and percentage marked as being not a duplicate profile
Remaining	The number of remaining profiles
Point calculation actions	The search action taken according to the profile match set point set up
Search for not processed profiles	Press this button to search for not processed profiles
Search for profiles with no duplicates	Press this button to activate search for profiles marked as not duplicate
Search for all	Press this button to search for all profiles within the Profile filter
Clear where no duplicate found	Press this button to clear the duplicate information. When searching for potential duplicate profiles all profiles get marked as being a duplicate or being no duplicate profile. Using this button will clear the information. Please note that once this information is cleared, it is not possible to identify the profile as processed
Clear all	Press this button to clear all filters
Clear below limit	Press this button to clear all profiles from the filter as being below limit

Limit	Enter a limit for the profiles to be cleared from the filter when pressing 'clear below limit'
Match point setup	Select this option to access the match point setup configuration. See: Setup → Configuration → Miscellaneous → Profile Match Point Setup for more details.
Profile actions	The profile merge action
Merge over limit	
Limit	Defines the limit used for the merge process
Refresh	Press this button to refresh the screen for example when changing the profile filter
Profile filter	Displays the applied profile filter for the actions. Following choices are available: Selected- the selected profiles Filtered - all profiles to which the advance query applies Every profile- all profiles

 This option is controlled by the parameter ENABLE DUPLICATE SEARCH under Setup → Configuration → Global Settings → Profile 1 tab.

 Duplicates functionality is controlled by the user right PROFILE DUPLICATE SEARCH under Setup → Configuration → Users → User Definition → Rights → Customer Profiles.

Note: When using Hotel Connector functionality, this option has to be run before synchronising profiles with the master.

View last merged profile

This option displays the last profile which was merged.



The screenshot shows a window titled "View last merged profile" with a blue header and standard window controls. The content is divided into two main sections: "Guest Recognition" and "Statistics".

Guest Recognition		Statistics	
Name	Mustermann, Vitaly Dear Mr ↻	Room Nights	0
Address	Summer Street 99	Adult Nights	0
	Hamburg	Stays	0
Communication		Revenue	↻ 0.00 EUR
Telephone -	Info@Micros.com	POS Revenue	
Business Main		Next Reservations	
		↻ 2591	27/12/11 DR
		↻ 2572	24/01/12 DR

Pot. Duplicates

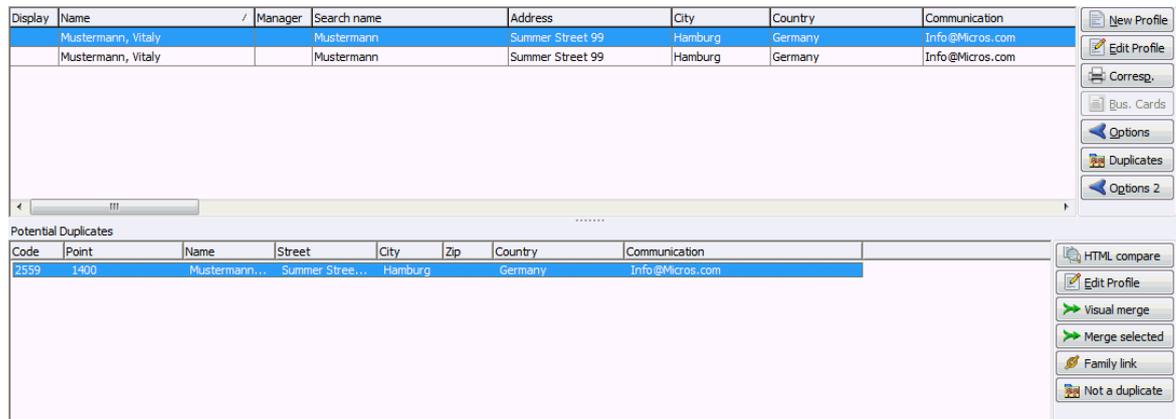
The Potential Duplicates screen is displayed in one of two ways:

- By selecting the option POT. DUPLICATES from the Duplicates menu on the profile navigator - this displays the Potential Duplicates grid which lists the possible duplicate profiles for the profile listed in the customer profile search result grid.
- When saving a new profile, the duplicate points are calculated and the Potential Duplicates screen is displayed if there are profiles which are considered possible duplicates.

How to display potential duplicates via the menu option

1. Click the CUSTOMER RELATIONS menu and select PROFILES.
2. Search for and select the required profile, then select POT. DUPLICATES from the DUPLICATES menu of the profile navigator.

The Potential Duplicates dialog box is displayed.



3. The options available to handle potential duplicates are listed on the right-hand side of the grid.
4. Click SAVE to close the dialog box and save the assigned number.

Potential Duplicate Options

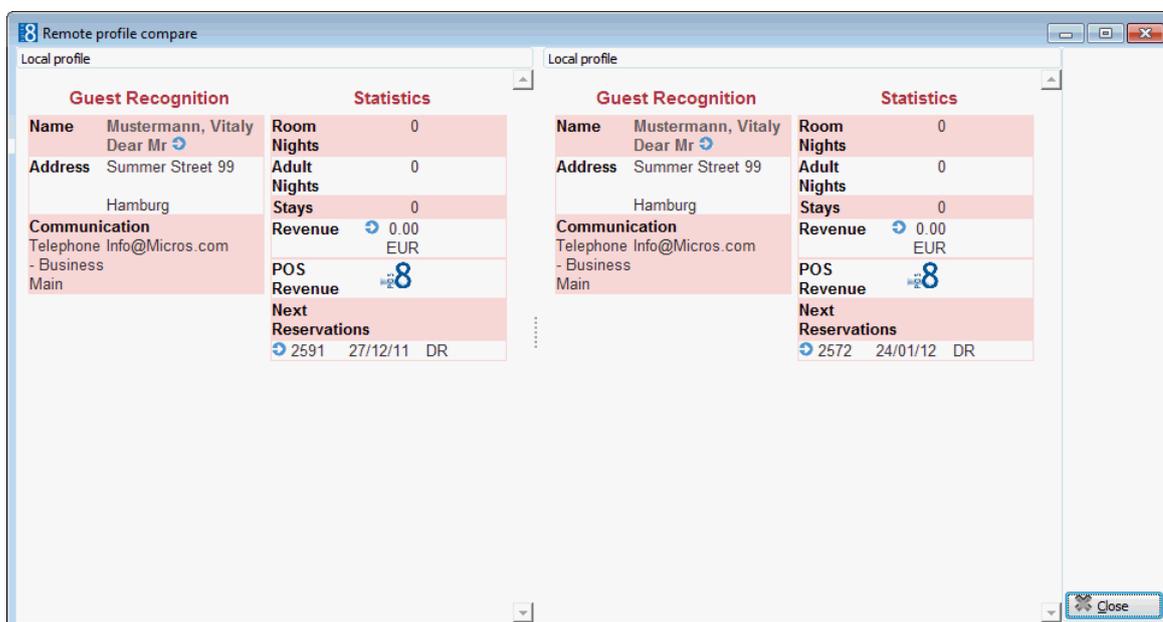
Button	Definition
HTML compare	Select this option to compare the Profiles in HTML view
Edit Profile	Select this option to edit the selected profile
Visual merge	Shows merge information of Details, Address, Communication, Notes and Linked profiles and opens the duplicate merge dialog box.
Merge all	To merge all profiles.
Merge selected	To merge all selected profiles.
Family link	Select a profile and press this button to assign a role and mark the potential duplicate profile as a family member. This will exclude the profile from further duplication search. This option is not available for company profiles.

Not a duplicate	Press this button to link/clear selected profiles, the one on the regular customer profile grid and the one on the potential duplicate grid will be marked as being not a duplicate profile. The link table in the database is called xndl. The field NO DUPLICATE in this table contains the number of linked pot duplicate profiles marked as 'not a duplicate' (this is the number of xndl records). The field can be added to the customer profiles grid by using CUSTOMIZE from the right mouse short cut menu in the customer profiles grid. Profile duplicate search will not find these records.
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Displaying potential duplicates via HTML Compare

1. Search for and select the possible duplicate profile from the Potential Duplicates dialog box.
2. Click HTML COMPARE.

The Remote profile compare screen is displayed



Merge Profile dialog box

Button	Definition
HTML compare	Press this button to compare the Profiles in HTML view
Data rule merge	Defines the merge rule used. Currently only FULL MERGE should be used.
Merge rules	Displays the fields for the merge of the profile
Differences	Select this field to display differences of the profiles in red
Select other side	Select this field to select the same field on the other side
Reverse	Press this button to switch target and source profiles
Merge	Select this button to activate merge
Save	Press this button to save and close the screen settings
Cancel	Press this button to cancel merge
Copy to right	Select a row on the left and press this button to copy the selected information to the right

Copy to left	Select a row on the right and press this button to copy the single row to the left
Copy all to right	Press this button to copy all information to the right side
Copy all to left	Press this button to copy all information to the left side

Note: Two profiles can not be merged if they both have an account in Accounts Receivable.

-  The duplicate check when creating or editing a profile is controlled by the parameters ENABLE DUPLICATE SEARCH and DUPLICATION CHECK AFTER PROFILE EDIT under Setup → Configuration → Global Settings → Profile 1 tab.
-  Duplicates functionality is controlled by the user right PROFILE DUPLICATE SEARCH under Setup → Configuration → Users → User Definition → Rights → Customer Profiles.

3 Tasks & Activities

Creating and maintaining tasks & activities is an important part of the Sales Managers daily routine, Suite8 is capable of tracking any kind of task or activity. Tasks and activities are linked to the appropriate customer profile in order to be included on sales activity reports.

A task or activity can be linked to a company profile, individual profile (contact), booking or can be created without any link. The possibility to record all interactions associated with a customer or prospect will create a comprehensive history.

Generally activities are given a specific time when they need to be carried out, tasks are not linked to a specific time, for example, preparing a mailing or calling a customer.

Tasks & activities are also linked to at least one manager (employee). It is mandatory to assign a manager as primary and optional to link additional managers as required. Depending on the set user rights it is possible to limit the tasks & activities to be viewed to only the user that is logged in.

Once a new task or activity has been entered, it can then be edited, copied, moved, printed or deleted.

Key features of Task & Activity Management are:

- An unlimited number of user defined task & activity types, e.g. sales call, mailing, phone call, site inspection, etc.
- Activities are attached to a specific time.
- The ability to enter a task that is not linked to a specific time.
- Possibility to define a primary manager and to link an unlimited number of additional managers.
- Free format field to further define the purpose of the task or activity or to give a description.
- Completion Date in order to complete the task or activity and a notes field to track additional information such as sales activities.
- Easy overview of not completed/completed tasks and activities.
- Possibility to create tasks and activities via menu options, via the calendar and via a function key.
- Possibility to create activities as 'All day events'.
- Possibility to check the availability of the responsible employee.
- Possibility to filter own tasks & activities.
- Possibility to filter on fields such as task & activity types, dates, purpose, etc.
- Advanced search capabilities.
- Possibility to set reminders on activities and have the option to choose 'Dismiss' or 'Snooze'.
- Scheduled activities will be displayed in a graphical format such as a calendar.
- The possibility to drag and drop existing activities to a different time within the calendar.
- Tree nodes under the tasks & activities management show linked company/contacts and linked managers.
- Booking details are displayed on the HTML for any tasks or activities linked to a specific booking.

Searching for a Task or Activity

Users can search for either tasks or activities, select to view all tasks and activities or just those which are either completed or not completed. The default display shows all tasks and activities which have not been completed for the current date

Entering a task and activity query

The query screen is split into three sections:

- The basic search criteria
- The advanced query options
- The view selection

The basic search criteria

You may fill in multiple fields to narrow the search criteria. The actual query is displayed in a script format in a window on the right hand side of the screen. The fields are explained in the table below:

Fill in this field	With this information
Company Name	The company name.
Contact Name	The contact name.
Date from to	The from and to dates for which to display tasks and activities.
Type	The type of task or activity.
Manager	The manager name.
Description	The description of the task or activity.

 The option Disable remote search is controlled by the parameter SEARCH_REMOTE_ON_PROFILES_GRID under Setup → Configuration → Global Settings → Hotel Connector → Hotel Connector 1 tab.

 Show Family Members functionality is controlled by the parameter ENABLE_FAMILY_WIZARD under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

Note: The profile name search considers values in the fields: XCMS_NAME1, XCMS_NAME2 and XCMS_NAME3.

The advanced query options

The advanced query consists of three selection fields:

- The first allows you to select from a drop-down list of query possibilities. Query options are:
 - Date Complete
 - Creation date
 - Task Status
 - Task Priority
 - End Date / Due Date.
- The second limits the query to a second level or gives a choice of operators/conditions.
 - Equal to
 - Not Equal to
 - Greater than
 - Less than
- The third field requires either a free-format value or for the user to select a possible value from a drop-down list.

The view selection

The search can be further modified by adjusting the view; the view option is set by default to show all 'Not Completed' tasks and activities.

Task & Activity View Options

View	Shows
All	All activities and tasks regardless of status.
Completed	Only activities and tasks which have been marked as completed.
Not Completed	Only activities and tasks which have not been marked as completed (Default).

Note: You may fill in multiple fields to narrow the search criteria. The actual query is displayed in a script format in a window on the right hand side of the screen and as long as the Filter is not cleared by pressing the CLEAR button, each additional query will be added to the actual query list.

Wildcards

The search criteria can also be entered using wildcards (%). For example, M%ller will return Miller, Muller, %Bank will return Investment Bank, American Bank and Fidelio% will return Fidelio GmbH or Fidelio Inc.

How to search for an activity or task

1. Click the CUSTOMER RELATION menu and select TASKS & ACTIVITIES to display the Tasks & Activities screen.

2. Type the company name in the COMPANY NAME box or click the three dots button and search for the company name via the profile search screen.
3. Type the contact name in the CONTACT NAME box or click the three dots button and search for the contact name via the profile search screen.

-
4. Type the dates the task or activity takes place in the DATE FROM/TO boxes or click the drop down arrow and select a date from the calendar.
 5. Click the drop down arrow and select the type of task or activity from the TYPE list.
 6. Click the drop down arrow and select a manager from the MANAGER list or select an ASSIGNED USER.

Note: If the Global setting USER ASSIGNMENT FOR TASKS & ACTIVITIES is activated then ASSIGNED USER is displayed otherwise MANAGER is displayed.

7. Enter a description of the task or activity in the DESCRIPTION box.
8. The ADV. QUERY options may be used to further define the query, see Advanced Task & Activity Search
9. Click SEARCH, to display the tasks & activities according to the entered criteria.
10. The results are displayed in grid format in the middle of the screen and in HTML format in the lower part of the screen. The HTML details displayed are of the record that the cursor is on in the grid.

Task & Activity Grid

This column	Shows this information
Completed	A check mark shows if the task/activity has been completed.
Manager	Sales Manager for whom this task/activity belongs.
Type	Indicates the type of manager assignment P - Primary or A - Assigned Manager.
Start Date	Starting date for task/activity.
Start Time	Starting time for the activity.
Company Name	Displays the link to a company profile.
Contact Name	Displays the link to an individual profile.
Act/Task Type	Type of task/activity.
Description	Description of the purpose of the task/activity.
End Date	End/due date for the task/activity.
Completed Date	The date the task/activity was completed.
Completed %	Shows the % of the task completed.



The display of all tasks & activities until today's date when opening Tasks & Activities is controlled by the parameter SHOW ALL NOT COMPLETED TASKS & ACTIVITIES UNTIL TODAY under Miscellaneous → User Settings → Search Screens tab.

Note: If the parameter USER ASSIGNMENT FOR TASKS & ACTIVITIES is activated under the Global Settings → Profile tab then all assigned users are displayed by default in the ASSIGNED USERS box and all tasks & activities for those users are displayed. If no users are assigned then only the tasks & activities of the logged in user are displayed.

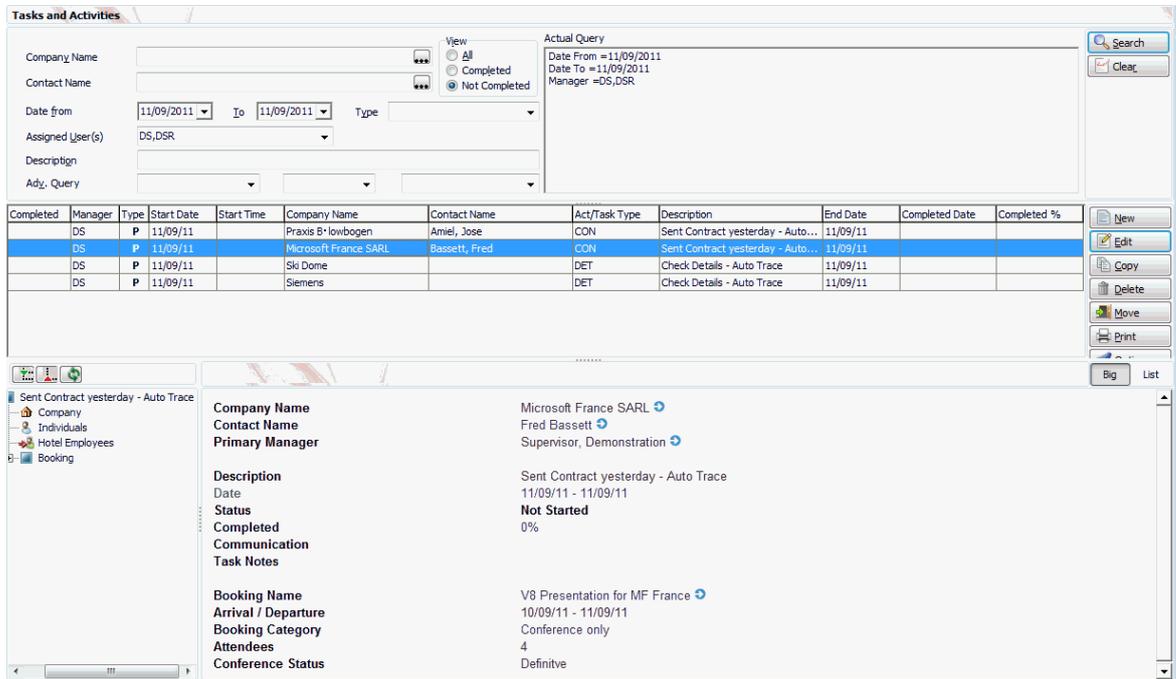
If the parameter is active and the user right ASSIGN USERS TO TASK & ACTIVITIES is active then users can be assigned under Configuration → Users → User Definition → Assign Users for T&A.

If the parameter is not active then the MANAGER option is displayed, the selection for MANAGER is empty and every user is able to see and work with all tasks & activities (depending on the user/owner rights). The MANAGERS to be displayed by default can be set under Miscellaneous → User Settings → Search Screens.

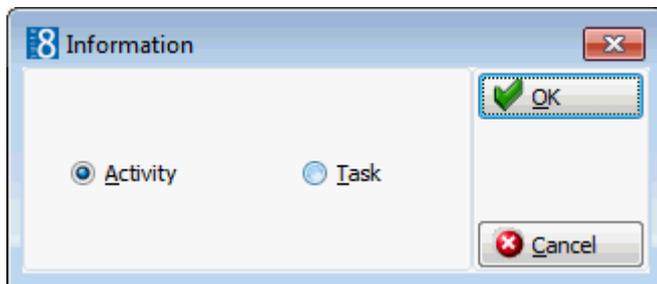
New Activity

How to create a new activity

1. Click the CUSTOMER RELATION menu and select TASKS & ACTIVITIES to display the Tasks & Activities screen.



2. Click NEW, the Activity/Task selection dialog box is displayed.



3. Select ACTIVITY then click OK, the Activity Edit Screen is displayed.

4. Complete the fields as detailed in the table below.
5. Click OK, the activity is displayed in the tasks and activities grid.

Activity Edit dialog box

Fill in this field	With this information
Company Name	Link to a company profile.
Contact Name	Link to an individual (contact) profile.
Company T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected company are shown for one year in the past and one year in the future.
Contact T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected contact are shown for one year in the past and one year in the future.
Communication	Preferred communication method for the activity.
Booking ID	The ID number of the booking master. Note: This field is information only and is displayed only if the activity is linked to a conference booking.
Booking Name	The name of the conference booking. Note: This field is information only and is displayed only if the activity is linked to a conference booking.
Arrival Date	The arrival date or the booking. Note: This field is information only and is displayed only if the activity is linked to a conference booking.

Resp. Employee	Employee for whom this activity belongs.
Activity Type	Type of Activity.
Activity Description	Free format field to further define the purpose of the activity or to give a description of activity. By default the field is completed with the activity type as defined in the previous field.
All Day Event	Checking this field will mark the activity as an all day event. An activity marked as an all day event is displayed at the top of the column under the date field and not on the grid itself.
Check Availability	Select this checkbox to check availability when an activity is entered. If this option is active then each time an activity is entered for the resp. employee for that day and time, the availability message is displayed.
Start Date	The starting date of the activity.
Start Time	The starting time of the activity. The default starting time is defined in the Global Settings → Profile 1 tab.
End Date	The ending date of the activity.
End Time	The ending time of the activity. The default ending time is defined in the Global Settings → Profile 1 tab.
Show As	Selecting an entry from this list box shows whether the activity is taking place out of the office, if the Sales Manager is busy or free, etc.
Private	Checking this field will mark the activity as private. Note: Functionality not yet implemented.
Reminder	A reminder can be set, ranging from 5 minutes to one month. Users then have the option to choose to 'Dismiss' or 'Snooze' the activity. The reminder is sent to the responsible manager and any assigned managers.
Date Completed	Date the activity was completed - select from calendar.
	Free format field to add any additional notes or information. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.

Editing an Activity

How to edit an activity

1. Click the CUSTOMER RELATION menu and select TASKS & ACTIVITIES to display the Tasks & Activities screen.
2. Search for and locate the activity to be edited then click EDIT, the Activity Event screen is displayed.

8 Edit Activity Check Details - 06/09/11 8:00 AM (ID: 1969)

Activity Manager Assignment Linked Documents

Company Name MICROS Company T&A

Contact Name Mr. Ralph Aceti Contact T&A

Communication

Resp. Employee DS DS Demonstration Supervisor

Activity Type DET Check Details

Activity Description Check Details

All Day Event Check Availability

Start Date 06/09/2011 Start Time 8:00 AM

End Date 06/09/2011 End Time 8:00 AM

Show as BUS BUS Busy Private? Reminder

Date Completed

Created on - Tuesday, February 22, 2011 11:32 AM Created by - Demonstration Supervisor

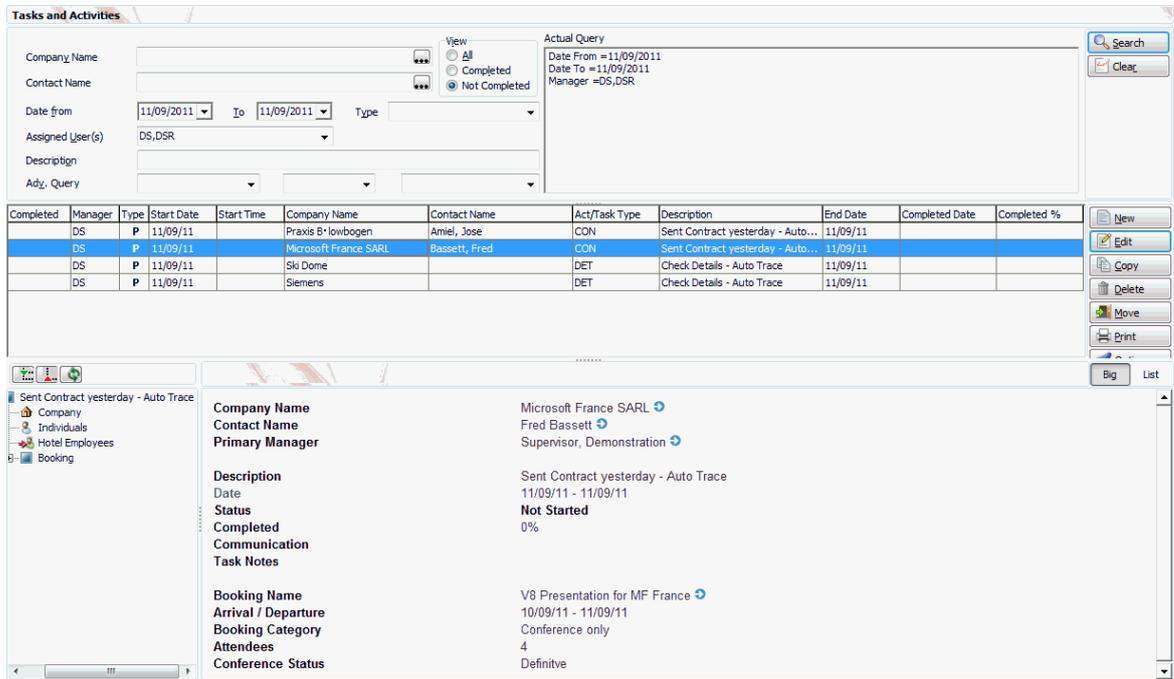
OK Print Cancel

3. Make any changes necessary.
4. Click OK to save the changes.

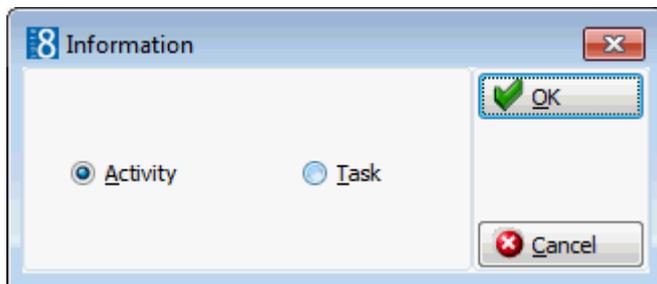
New Task

How to create a new task

1. Click the CUSTOMER RELATION menu and select TASKS & ACTIVITIES to display the Tasks & Activities screen.



2. Click NEW, the Activity/Task selection dialog box is displayed.



3. Select TASK then click OK, the Task dialog box is displayed.

4. Complete the fields as detailed in the table below.
5. Click OK, the activity is displayed in the tasks and activities grid.

Task Dialog Box

Fill in this field	With this information
Company Name	Link to a company profile.
Contact Name	Link to an individual (contact) profile.
Company T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected company are shown for one year in the past and one year in the future.
Contact T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected contact are shown for one year in the past and one year in the future.
Communication	Preferred communication method for the task.
Booking ID	The ID number of the booking master. Note: This field is information only and is displayed only if the task is linked to a conference booking.
Booking Name	The name of the conference booking.

	Note: This field is information only and is displayed only if the task is linked to a conference booking.
Arrival Date	The arrival date or the booking. Note: This field is information only and is displayed only if the task is linked to a conference booking.
Resp. Employee	Employee for whom this task belongs.
Task Type	Type of Task.
Description	Free format field to further define the purpose of the task or to give a description of task.
Check Availability	Select this checkbox to check availability when a task is entered. If this option is active then each time a task is entered for the resp. employee for that day, the availability message is displayed.
Start Date	Starting date of the task.
Status	The status of the task, e.g. Not Started, Deferred, etc.
% Completed	The % of the task completed.
Due Date	Due date of the task.
Priority	Task priority - Normal, Low, High.
Notes	Free format field to add any additional notes or information. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.
Date Completed	Date the task was completed - select from calendar. Also updates the STATUS field to completed and the field % COMPLETED to 100%.

Editing a task

How to edit a task

1. Click the CUSTOMER RELATION menu and select TASKS & ACTIVITIES to display the Tasks & Activities screen.
2. Search for and locate the activity to be edited then click EDIT, the task dialog box is displayed.

Edit Task Sent Contract yesterday - Auto Trace - 11/09/11 (ID: 1427)

Task: **Manager Assignment** | Linked Documents

Company Name: Microsoft France SARL [Company T&A]

Contact Name: Fred Bassett [Contact T&A]

Communication: [Dropdown]

Booking Id: 1194

Booking Name: V8 Presentation for MF France

Arrival Date: 10/09/2011 [Dropdown]

Resp. Employee: DS DS Demonstration Supervisor [Dropdown]

Task Type: CON Sent Contract - AT [Dropdown]

Description: Sent Contract yesterday - Auto Trace

Check Availability

Start Date: 11/09/2011 [Dropdown] | **Status**: Not Started [Dropdown] | **%Completed**: 0 [Spinner]

Due Date: 11/09/2011 [Dropdown] | **Priority**: Normal [Dropdown] | **Date Completed**: [Dropdown]

Notes

Created on - Monday, July 19, 2010 2:59 PM | Created by - Demonstration Supervisor

Buttons: OK, Print, Cancel

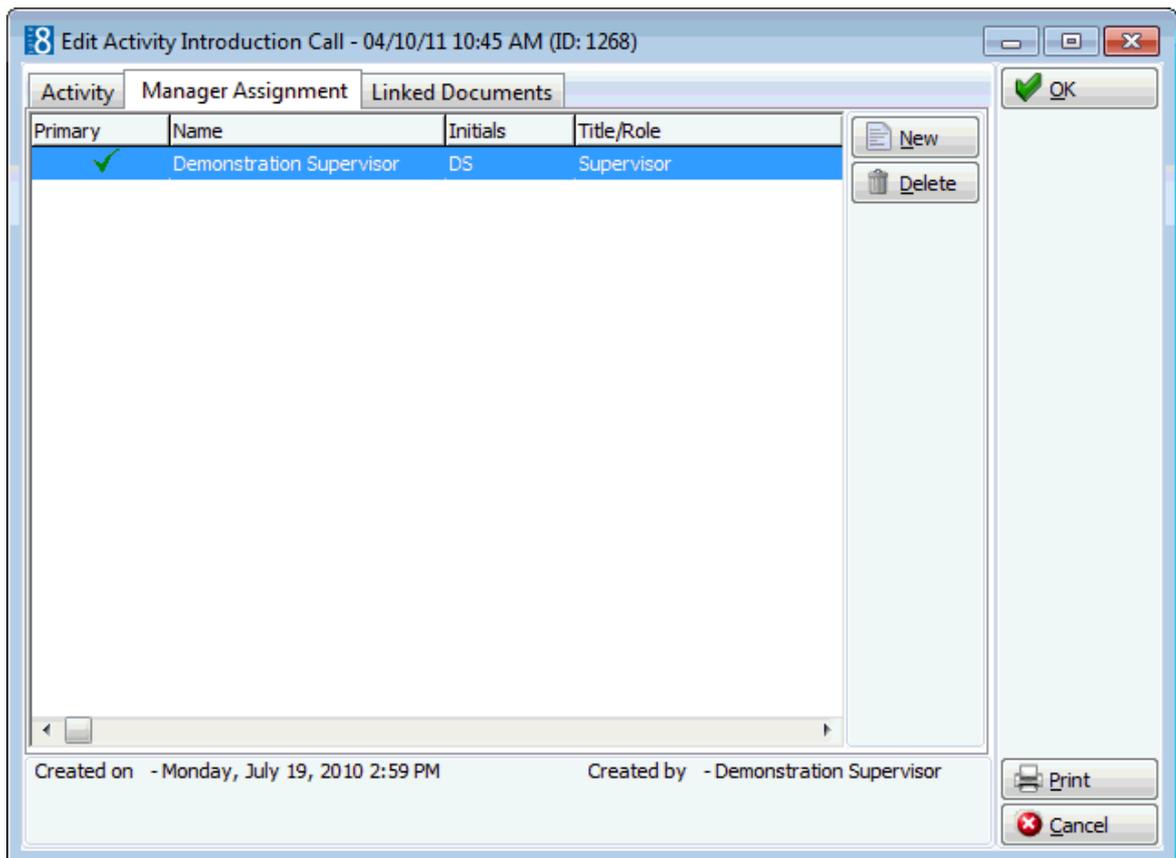
3. Make any changes necessary.
4. Click OK to save the changes.

Manager Assignment

The RESP. EMPLOYEE entered for the task or activity is automatically marked as the primary assigned manager. However, it is possible to link an unlimited number of managers.

How to add a new manager

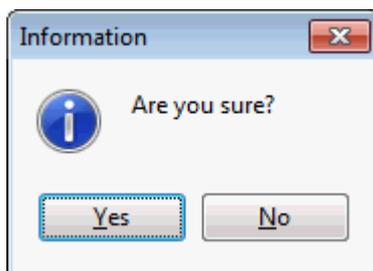
1. Display either the ACTIVITY or TASK dialog box.
2. Select the MANAGER ASSIGNMENT tab.



3. Click NEW, the Unassigned Managers dialog box is displayed.
4. Select the check box next to the required manager's name.
5. Click OK.

How to delete a manager assignment

1. Display either the TASK or ACTIVITY dialog box.
2. Select the MANAGER ASSIGNMENT tab.
3. Select the manager assignment to be deleted and click DELETE, a confirmation message is displayed.



4. Click YES to delete the manager assignment.

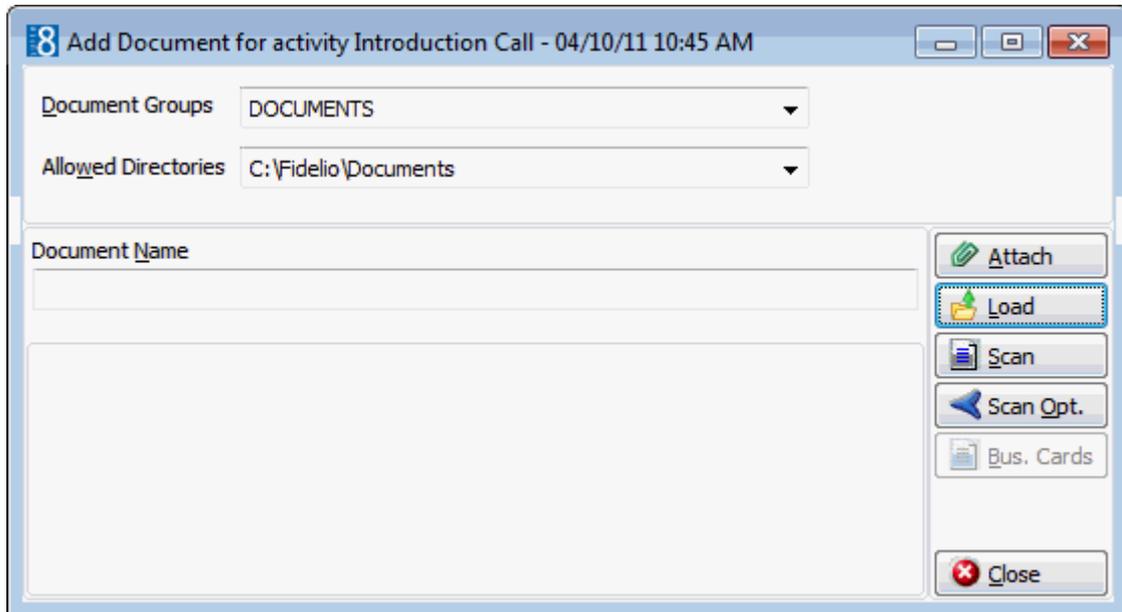
Linked Documents

This option enables the user to view, edit or add different types of documents to a profile, task or activity. It is recommended to place these documents on a shared network path to which all users have access. If a scanner is connected to the workstation you can also scan and attach documents such as contracts, letters or pictures. The scanner needs to be 'Twain' compatible.

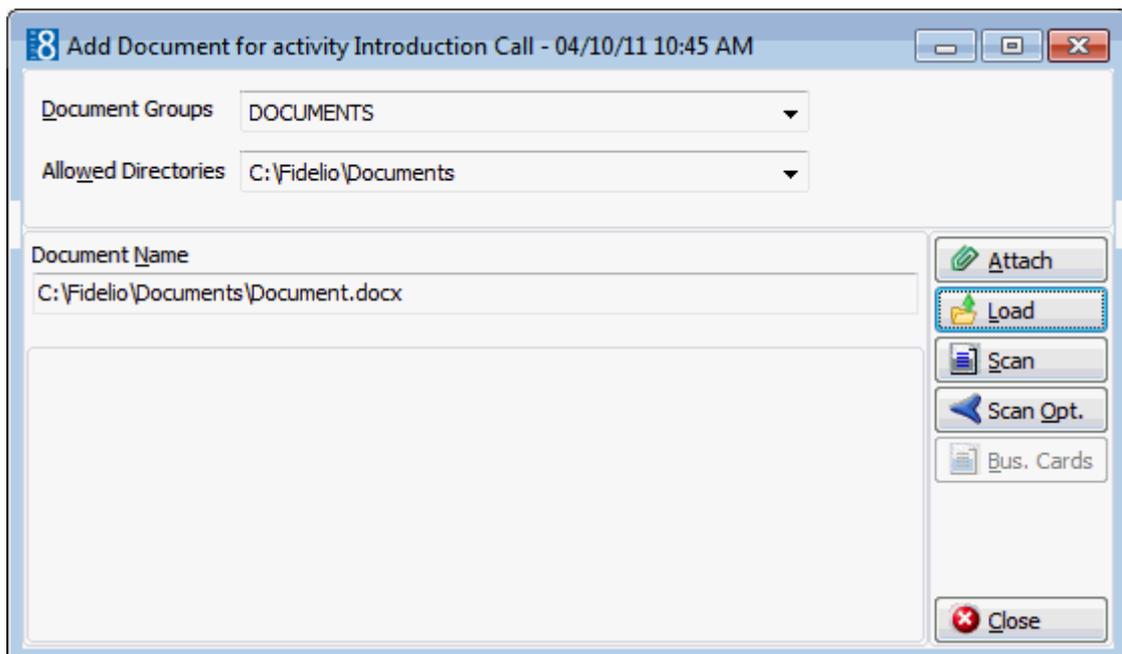
Note: The linked documents dialog box may be viewed from various access points, access is via the linked documents tab or via the options button, if available.

How to link a document

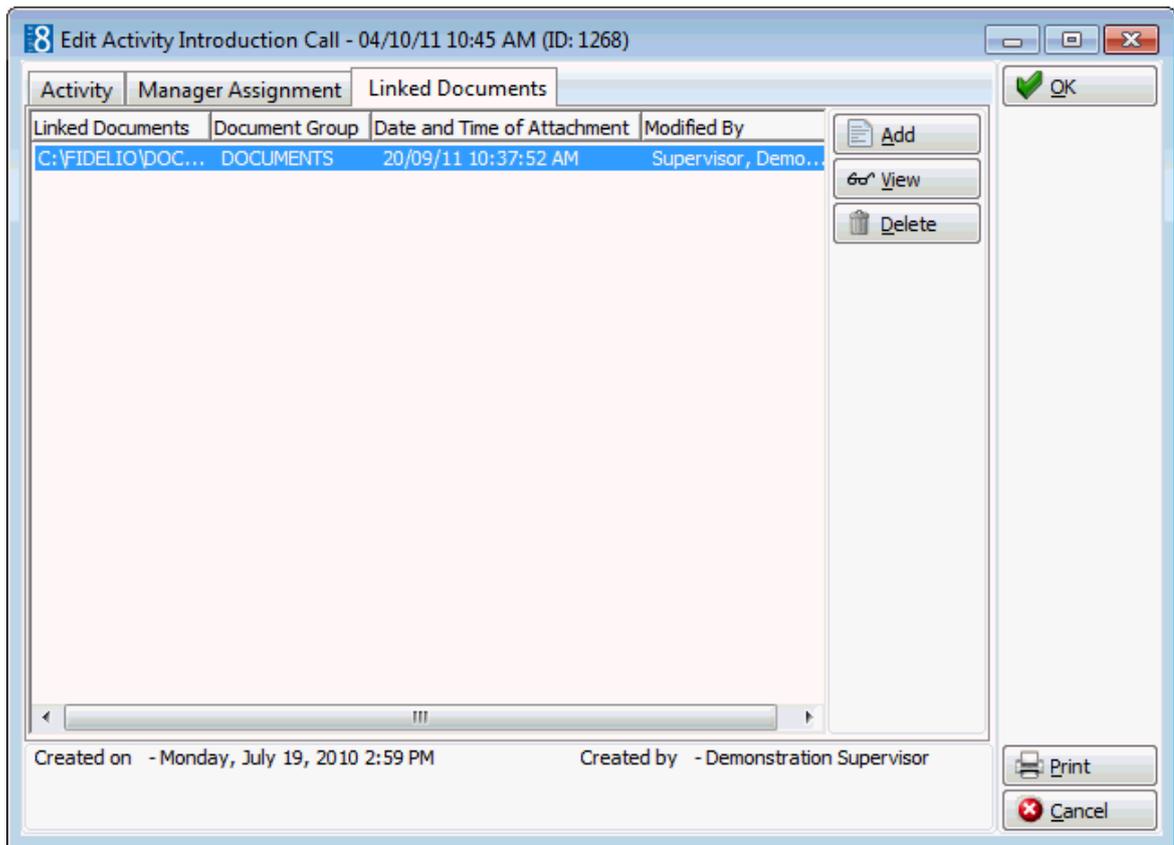
1. Select the LINKED DOCUMENTS tab.
2. Click ADD, the Attach documents dialog box is displayed.



3. In the DOCUMENT GROUPS list, select the document group required.
4. In the ALLOWED DIRECTORIES list, select the allowed directory required.
5. Click LOAD to display the list of documents.
6. Select the required document and click OPEN, the Document Name field is filled.



7. To attach the document, click ATTACH, the document is shown as linked on the linked documents tab.



Note: Pictures or images may be attached in JPG or BMP format. The default setting is JPG, but this may be changed via the OPTIONS button. The selected settings will be saved for that user.

How to view/edit a linked document

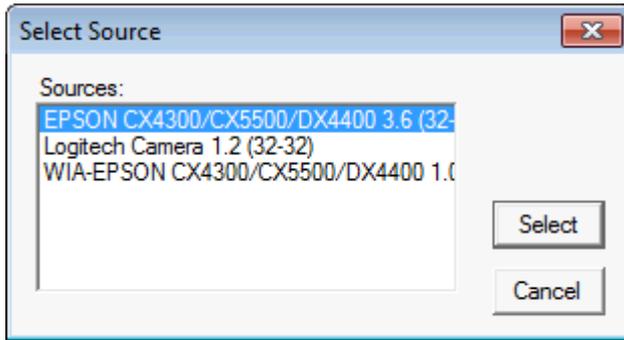
1. Select the LINKED DOCUMENTS tab.
2. Select the document and click VIEW.

Suite8 opens the relevant application, for example, Word if the document is a Word document.

Note: The document may be edited directly from within the opened application.

How to scan and link a document

1. Select the LINKED DOCUMENTS tab.
2. Click ADD, the attach documents dialog box is displayed.
3. In the DOCUMENT GROUPS list, click the document group required.
4. In the ALLOWED DIRECTORIES list, click the allowed directory required.
5. Click SCAN, the select source dialog box is displayed.



6. Select the source and click SELECT to open the scanner application.
7. Scan the document.
8. Click ATTACH to link the scanned document.

 Document groups and path are defined via the option DOCUMENT TYPES under Setup → Configuration → Miscellaneous.

 Adding or editing documents on the linked documents tab is controlled by the user right LINKED DOCUMENTS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Attach documents.

Copying a Task or Activity

This option is useful if a task or activity needs to be copied.

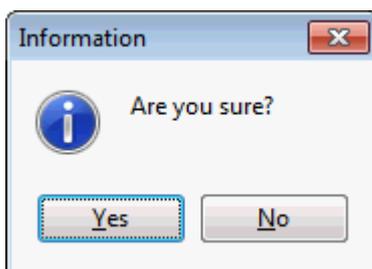
1. Highlight the appropriate task or activity in the grid.
2. Click the COPY button, if the task or activity is assigned to a specific company or individual then the profile search screen is displayed, if the task or activity is **not** linked to a company then the Task or Activity Edit screen is displayed and any changes can then be made.
3. Highlight the profile to which the task or activity should be copied to and click the SELECT button.
4. The new task or activity is displayed in the tasks and activities grid.

Note: On copied activities the activity START TIME is set to the default start time defined in Global Settings → Profile → Activity Start.

Deleting a Task or Activity

To delete a task or activity

1. Click the CUSTOMER RELATION menu and select TASKS & ACTIVITIES to display the Tasks & Activities screen.
2. Search for and locate the task or activity to be deleted.
3. Click DELETE, a confirmation message is displayed.



4. Click YES to delete the task or activity.

Printing a document from a task or activity

This print option opens the print dialog window. The screen is split into three sections.

- The first section is to choose a template from a list of predefined **TEMPLATES**, to select a language for the correspondence and to select if the correspondence should be saved.
- The second section is the **PROFILES** section and contains information about the profiles linked to the task or activity. The **DETAILS** section displays all the addresses from all the profiles linked to the task or activity. The primary address of the selected profile is selected by default. If there are several profile details displayed, you can select to which profile the letter should be sent. You also have the option to select another profile, if for some reason you need to send the letter to a different profile or address other than the linked profiles, click the **PROFILE SEARCH** button to activate profile search. Profiles linked to the task or activity can be edited by pressing the **EDIT PROFILE** button.
- The third section gives information about the **HISTORY** of sent correspondence for this task or activity. The template name and the print date are displayed. If a letter was edited and saved but not printed then the template name will be displayed with (Saved) after the name and the date and time it was saved.

 Print functionality is controlled by the user right **PRINT** under Setup → Configuration → Users → User Definition → Rights → Activities & Tasks.

 Default email subjects can be defined via the option **DEFAULT EMAIL SUBJECTS** under Setup → Configuration → Miscellaneous → Simple Custom Text.

 Default email body text can be defined via the option **EMAIL BODY DEFAULT** under Setup → Configuration → Miscellaneous → Simple Custom Text.

 The maximum size for email attachments is defined via the option **MAX. EMAIL ATTACHMENT SIZE (MB)** under Setup → Configuration → Global Settings → Reports → Reports tab.

 The ability to select a family greeting is controlled by the parameter **ENABLE FAMILY WIZARD** under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

How to preview a document

1. Select the appropriate task or activity in the grid; click the **PRINT** button to display the Print dialog box.
2. In the **TEMPLATES** box click the drop-down arrow and select the template to be used.
3. In the **LANGUAGE** box the language of the selected profile is selected by default. Click the drop-down arrow and select another language if required, if no language is selected, the default language from the language configuration will be used.
4. In the **PREF. DISTRIBUTION** box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the **SAVE REPORT** check box if the document should be saved in history.
6. Select the **FAMILY GREETINGS** check box if the family greeting should be used.
7. Select the **CONTACT** and **ADDRESS** information to be used in the document.
8. Click **PREVIEW**, the document is generated and displayed on the screen.
9. At this point the document can be printed or saved to be printed at a later time.

-
10. To print the document, click the PRINT icon.
 11. To save the document, click the SAVE icon, enter a file name to save the document.
 12. Click SAVE.
 13. Close the preview screen.

How to print a task or activity

1. Select the appropriate task or activity in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box the language of the selected profile is selected by default. Click the drop-down arrow and select another language if required, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family greeting should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click EDIT, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
9. Make sure that all the entered information is correct; any necessary changes can be made at this time.
10. At this point the letter can be printed or saved to be printed at a later time.
11. To print the letter, click the PRINT icon or select PRINT from the file menu.
12. Close the edit screen, if changes were made you will be prompted to save the changes.
13. If using MS Word as the editor, click EXIT to close the application.
14. If the document was edited and saved but not yet printed then the template name will be displayed with (Saved) after the name and the date and time it was saved in the history section of the Print dialog box.
15. If the document was printed then the template name will be displayed and the date and time it was printed in the history section of the Print dialog box.

How to print a saved task or activity

1. Select the appropriate task or activity in the grid; click the PRINT button to display the Print dialog box.
2. Select the document to be printed from the list of templates in the HISTORY section of the screen.
3. Click EDIT HISTORY, the letter is displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
4. Make sure that all the entered information is correct; any necessary changes can be made at this time.
5. Click the PRINT icon or select PRINT from the file menu to print the letter.

6. Close the edit screen.
7. If using MS Word as the editor, click EXIT to close the application.
8. The document template name will be displayed and the date and time it was printed in the HISTORY section of the Print dialog box.

How to email a task or activity

1. Select the appropriate task or activity in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box the language of the selected profile is selected by default. Click the drop-down arrow and select another language if required, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family greeting should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click EMAIL, the document is generated and the email dialog box displayed.

The screenshot shows the 'Email Report' dialog box with the following fields and options:

- Sender:** info@micros.com
- To:** raceti@worldwide.com
- CC:** (empty)
- BCC:** (empty)
- Subject:** YOUR RESERVATION # 2622
- Send as Attachment
- Attachments:** (empty)
- Email Addresses:**
 - Select All
 - raceti@worldwide.com
 - amex@amex.com
- To:** (button)
- CC:** (button)
- BCC:** (button)
- Email Body Templates:** <Default> Default.EMAIL Body EN
- Body Format:** Text HTML

The main content area displays the following text:

RESERVATION CONFIRMATION 2622

Thank you for your reservation at the Micros-Fidelio Demo Program. It is our pleasure to confirm your accommodation details as follows:

Reservation for Mr. Ralph Aceti, arriving on 11/01/11 is booked for 1 Double Room staying with 1 Adult and 0 Child for a rate of 100.00 € per room and night.

Your Confirmation Number is 2622.

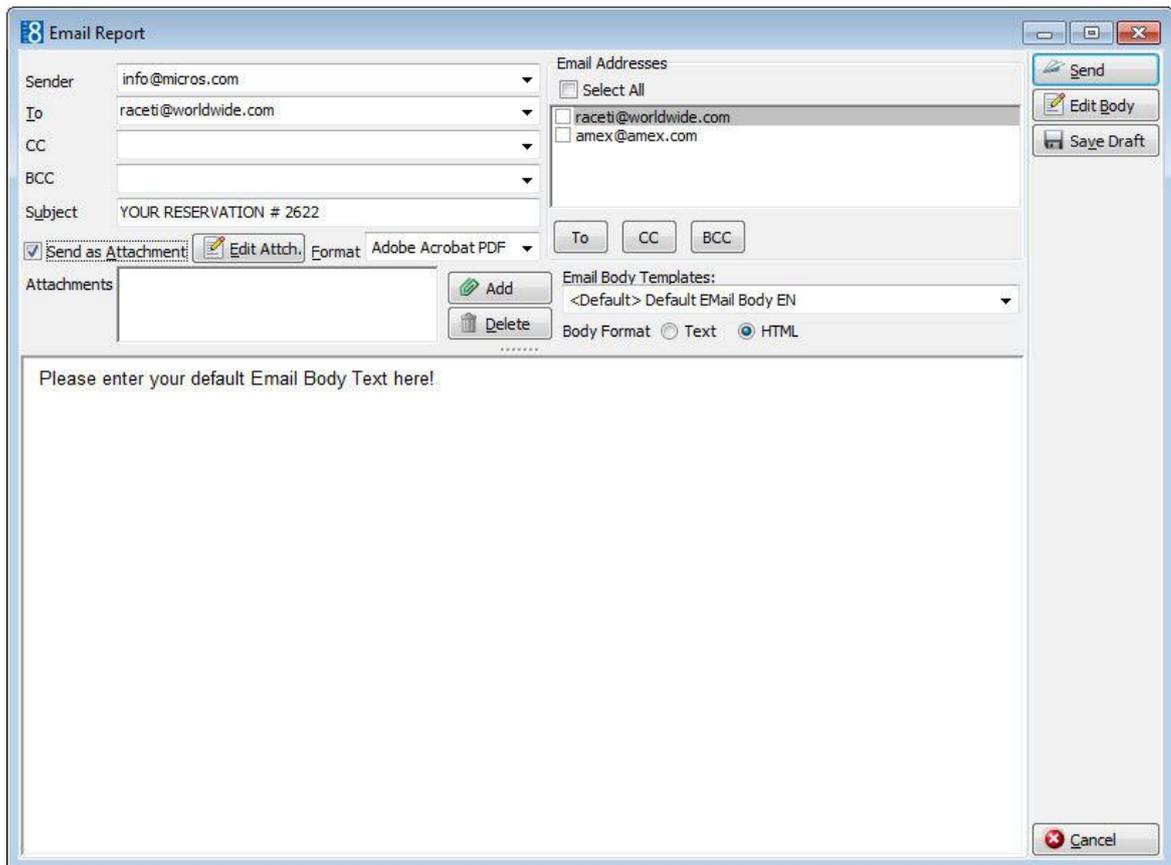
As you have guaranteed this reservation, your room will be held all night. Cancellations must be made directly to the hotel by 14.00 hours on the day of arrival. In the event of a non-arrival or late cancellation, the cost of one full night will be levied against your card.

All of our bedrooms and suites feature the latest in-room technology along with individually controlled air conditioning, minibar, hi-tech television, valet and laundry service, 24 hour room service and fitness centre with treatment rooms.

-
9. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
 10. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
 11. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
 12. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
 13. In the BODY box make sure that all the entered information is correct, any necessary changes can be made at this time.
 14. Click SEND, the document is generated and the email sent.
 15. A confirmation message is displayed confirming that the message was sent.

How to email a task or activity as an attachment

1. Select the appropriate task or activity in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box the language of the selected profile is selected by default. Click the drop-down arrow and select another language if required, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family greeting should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click EMAIL, the document is generated and the email dialog box displayed.



9. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent, or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
10. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
11. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
12. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
13. Select the SEND AS ATTACHMENT check box if the document should be sent as an attachment rather than in the body of the email.
14. To edit the document click the EDIT ATTACH. button, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
15. In the FORMAT box select the format for the attachment.
16. In the BODY box enter the text which should be included in the body of the email.
17. Click SEND, the document is generated and the email sent.

18. A confirmation message is displayed confirming that the message was sent.

Note: Attachments sent in PDF format are automatically password protected so that no changes can be made to the original PDF.

Note: When sending correspondence as a PDF attachment, the PDF files are stored both in the database and in the Mailing Documents directory defined in the configuration. After the correspondence has been successfully sent the PDF files are removed from the database.

How to email a task or activity with an attachment

1. Select the appropriate task or activity in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box click the drop-down arrow and select the language, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is selected then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the FAMILY GREETINGS check box if the family letter greetings should be used.
6. Creating correspondence for an individual profile requires that only the ADDRESS be selected as the profile is selected by default. When creating correspondence for a company profile, the primary CONTACT and primary ADDRESS of the company is selected by default, but can be changed as required.
7. Click EMAIL, the document is generated and the email dialog box displayed.

The screenshot shows the 'Email Report' dialog box. The 'Sender' field is 'info@micros.com' and the 'To' field is 'raceti@worldwide.com'. The 'Subject' is 'YOUR RESERVATION # 2622'. The 'Email Addresses' list includes 'raceti@worldwide.com' and 'amex@amex.com'. The 'Email Body Templates' dropdown is set to '<Default> Default EMail Body EN'. The 'Body Format' is set to 'HTML'. The main content area displays a reservation confirmation message:

RESERVATION CONFIRMATION 2622

Thank you for your reservation at the Micros-Fidelio Demo Program. It is our pleasure to confirm your accommodation details as follows:

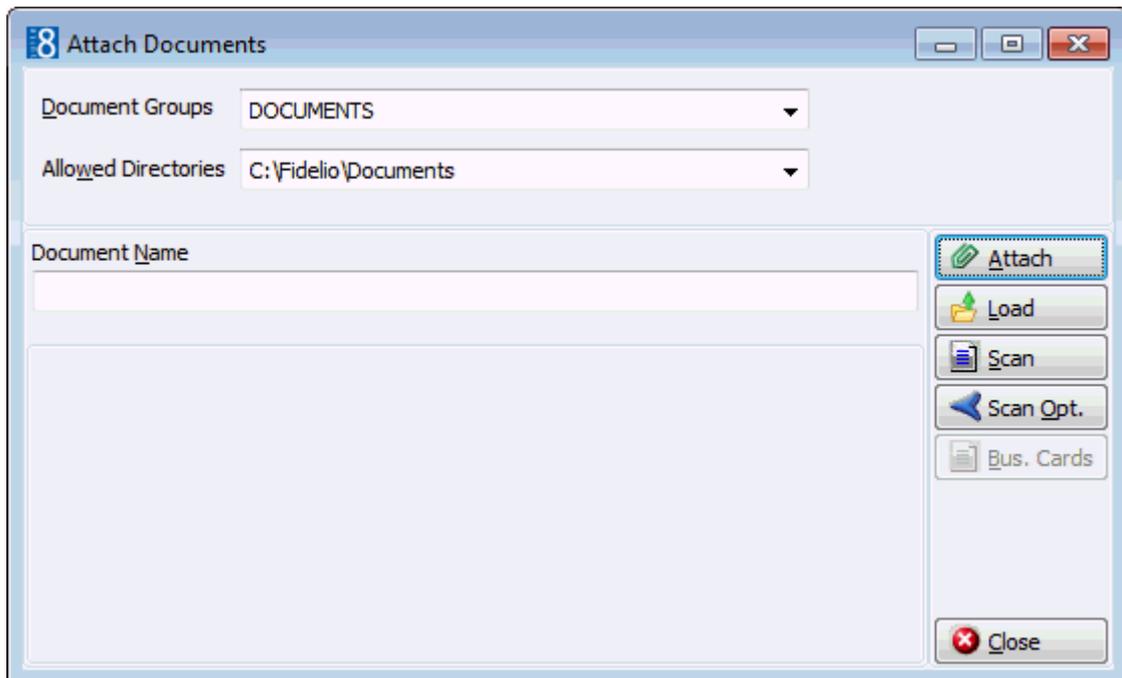
Reservation for Mr. Ralph Aceti, arriving on 11/01/11 is booked for 1 Double Room staying with 1 Adult and 0 Child for a rate of 100.00 € per room and night.

Your Confirmation Number is 2622.

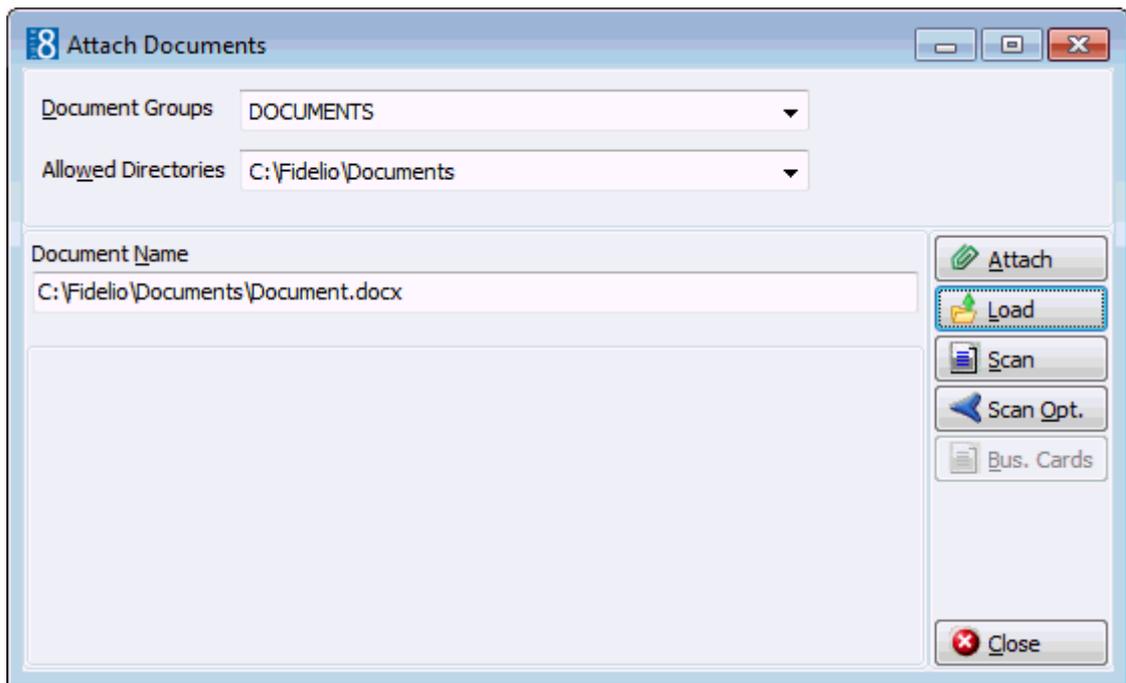
As you have guaranteed this reservation, your room will be held all night. Cancellations must be made directly to the hotel by 14.00 hours on the day of arrival. In the event of a non-arrival or late cancellation, the cost of one full night will be levied against your card.

All of our bedrooms and suites feature the latest in-room technology along with individually controlled air conditioning, minibar, hi-tech television, valet and laundry service, 24 hour room service and fitness centre with treatment rooms.

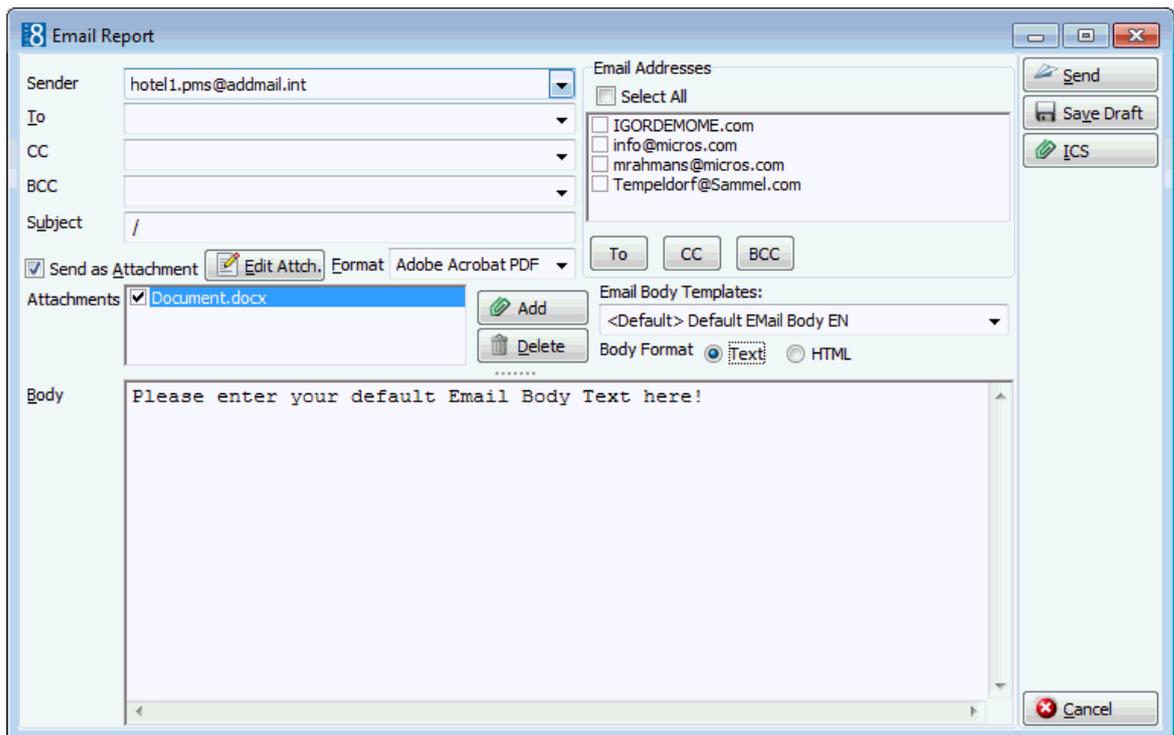
8. The To box is automatically completed with the email address from the profile, this can be changed by clicking the drop-down arrow and selecting the email address to which this email should be sent or by selecting the required email addresses from the list of available in the panel on the upper right-hand side and clicking the TO button. Click the SELECT ALL button and then the TO button to select all the available email addresses.
9. In the CC box click the drop-down arrow and select the email address which should be copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the CC button. Click the SELECT ALL button and then the CC button to select all the available email addresses.
10. In the BCC box click the drop-down arrow and select the email address which should be blind copied on this email or select the required email addresses from the list of available in the panel on the upper right-hand side and click the BCC button. Click the SELECT ALL button and then the BCC button to select all the available email addresses.
11. Enter the topic of the email in the SUBJECT box. If a default email subject has been defined, then this will be displayed.
12. Click ADD, the Attach documents dialog box is displayed.



13. In the DOCUMENT GROUPS list, select the document group required.
14. In the ALLOWED DIRECTORIES list, select the allowed directory required.
15. Click BROWSE to display the list of documents.
16. Select the required document and click OPEN, the Document Name field is filled.



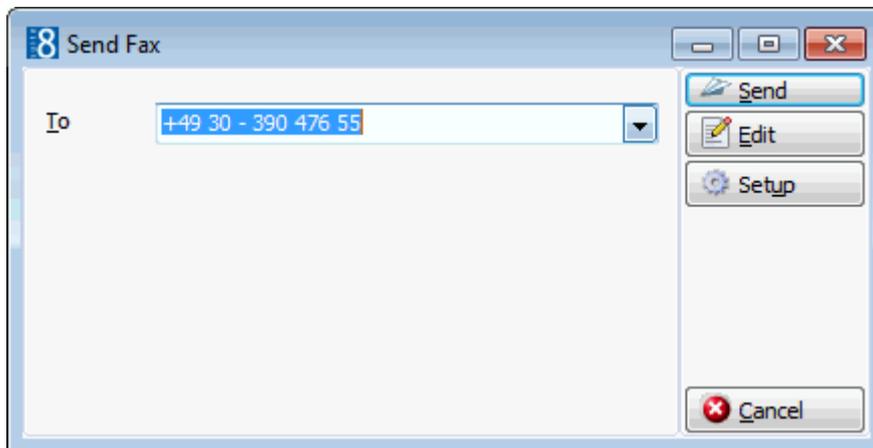
17. To attach the document, click ATTACH, the document is listed in the attachments box; select the document to attach it to the email.



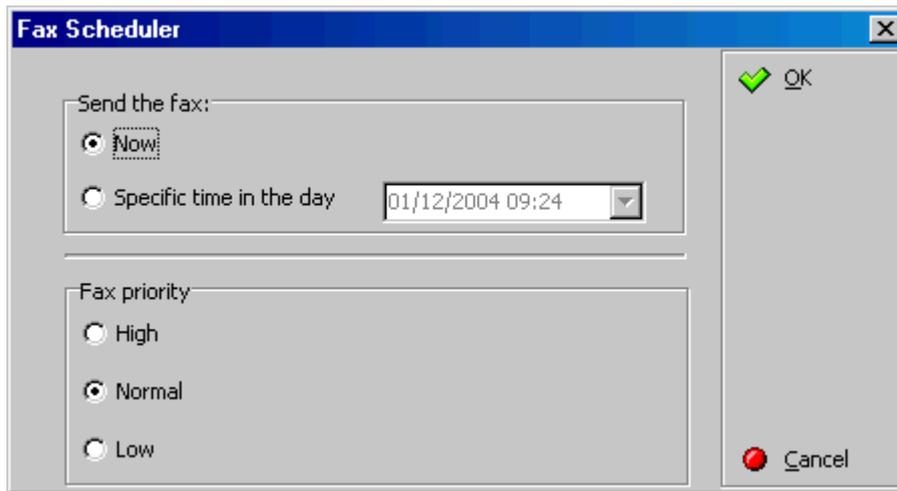
18. In the BODY box, make sure that all the entered information is correct; any necessary changes can be made at this time.
19. Click SEND, the document is generated and the email sent.
A confirmation message is displayed confirming that the message was sent.

How to fax a task or activity

1. Select the appropriate task or activity in the grid; click the PRINT button to display the Print dialog box.
2. In the TEMPLATES box click the drop-down arrow and select the template to be used.
3. In the LANGUAGE box the language of the selected profile is selected by default. Click the drop-down arrow and select another language if required, if no language is selected, the default language from the language configuration will be used.
4. In the PREF. DISTRIBUTION box the preferred method of distribution for this profile is displayed. If a company profile is attached then the contact profiles preferred method of distribution takes priority over the company's.
5. Select the SAVE REPORT check box if the document should be saved in history.
6. Select the FAMILY GREETINGS check box if the family greeting should be used.
7. Select the CONTACT and ADDRESS information to be used in the document.
8. Click FAX, the document is generated and the fax dialog box displayed.



9. The To box is automatically completed with the fax number selected from the profile.
10. To edit the fax click EDIT, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
11. Make sure that all the entered information is correct; any necessary changes can be made at this time.
12. To schedule the time the fax should be sent, click ADVANCED, the Fax Scheduler dialog box is displayed.



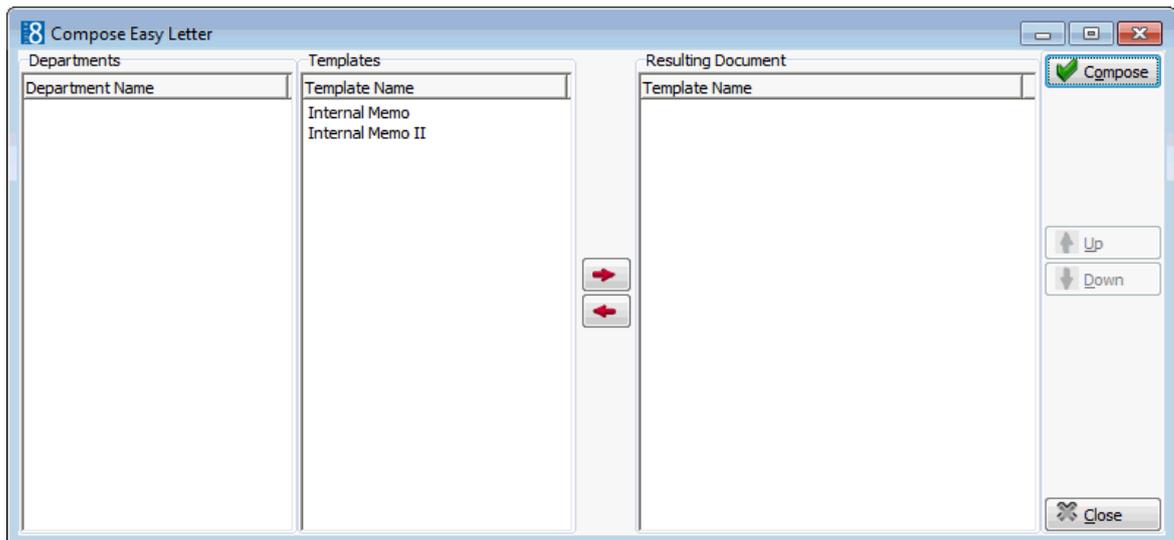
13. Select when to SEND THE FAX, the default is Now, to specify a specific date and time select a SPECIFIC TIME IN THE DAY and enter the date and time to send the fax.
14. Select the FAX PRIORITY, the default is Normal.
15. Click OK.
16. Click Send, the document is generated and the fax sent.

How to create an easy letter

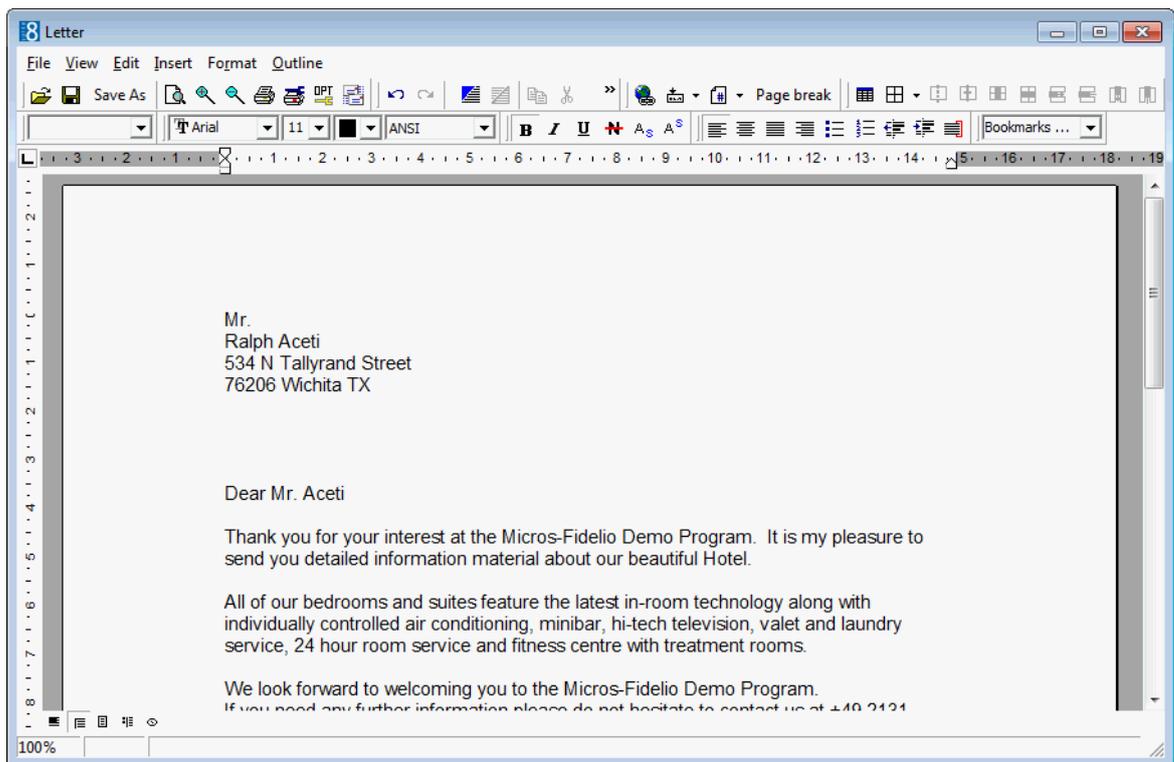
1. Select the appropriate task or activity in the grid; click the PRINT button to display the Print dialog box.
2. Creating correspondence for an individual profile requires that only the ADDRESS be selected as the profile is selected by default. When creating correspondence for a company profile, the primary CONTACT and primary ADDRESS of the company is selected by default, but can be changed as required.
3. Click EASY LETTER.

The Compose Easy Letter screen is split into 3 sections:

- Departments - lists the available departments; ALL DEPARTMENTS lists all available templates.
- Templates - lists the available templates; templates are displayed according to the selected department.
- Resulting Document - lists the templates which are selected by default.



4. Select the required department from the DEPARTMENTS list; the templates belonging to the selected department are displayed in the TEMPLATES list.
5. Select the required template from the list of available TEMPLATES; click the arrow button to move the template to the RESULTING DOCUMENT window on the right.
6. Repeat step 3 for all the required templates. The order of the templates may be changed using the UP and DOWN arrows.
7. Click the COMPOSE button to display the Internal Editor screen.



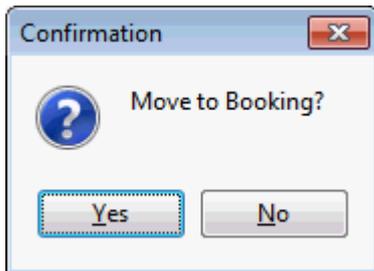
8. Make any additions or changes to the letter as required.
9. To print the letter, click FILE then PRINT.
10. To email the letter click FILE then E-MAIL.
11. To save the letter click FILE then SAVE AS.
12. Allocate a FILE NAME, choose the location to save the letter and click SAVE.

The letter is saved in RTF format.

13. Click FILE then CLOSE to exit the Internal Editor.

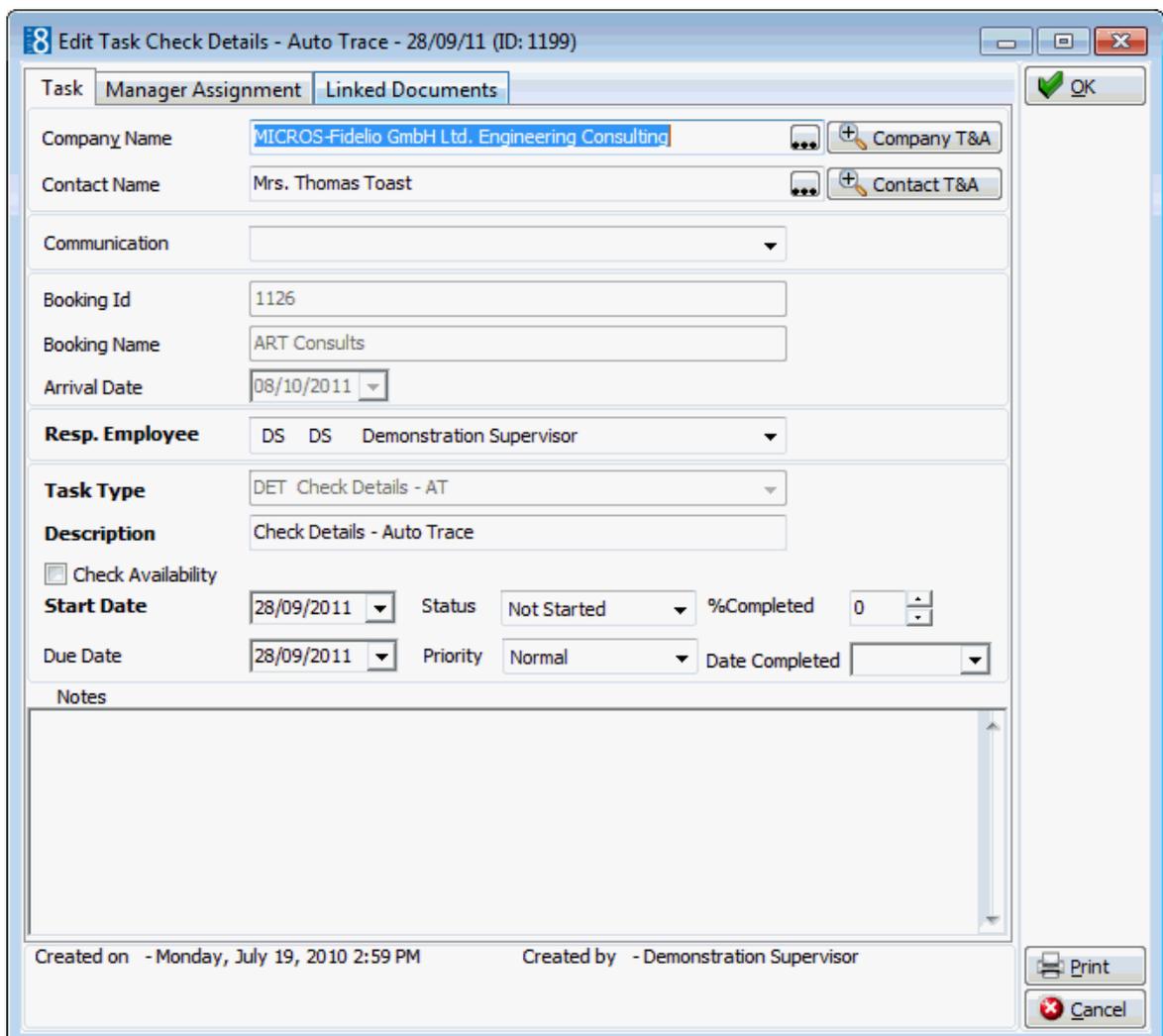
Moving a task or activity to a conference booking

1. Highlight the appropriate task or activity in the grid.
2. Click the MOVE button, the booking master search screen is displayed.
3. Locate the booking master to which the task or activity should be moved and click the SELECT button.



The task or activity is added to the booking and the tasks and activities grid is re-displayed.

4. Click EDIT to display the Task or Activity Edit Screen, the Booking ID, Booking Name and Arrival Date have now been added to the task or activity.

A screenshot of a software window titled "8 Edit Task Check Details - Auto Trace - 28/09/11 (ID: 1199)". The window has tabs for "Task", "Manager Assignment", and "Linked Documents". It contains several fields: "Company Name" (MICROS-Fidelio GmbH Ltd. Engineering Consulting), "Contact Name" (Mrs. Thomas Toast), "Communication" (dropdown), "Booking Id" (1126), "Booking Name" (ART Consults), "Arrival Date" (08/10/2011), "Resp. Employee" (DS DS Demonstration Supervisor), "Task Type" (DET Check Details - AT), "Description" (Check Details - Auto Trace), "Check Availability" (checkbox), "Start Date" (28/09/2011), "Status" (Not Started), "%Completed" (0), "Due Date" (28/09/2011), "Priority" (Normal), and "Date Completed" (dropdown). There is a "Notes" section with a text area. At the bottom, it shows "Created on - Monday, July 19, 2010 2:59 PM" and "Created by - Demonstration Supervisor". Buttons for "OK", "Print", and "Cancel" are visible.

Viewing the User log

1. Highlight the appropriate task or activity in the grid.
2. Click the **OPTIONS** button and select **USER LOG**.

The user log for the entered task or activity is displayed.

Note: Tasks & Activities are displayed in the user log if the relevant options are selected in **ACTIVITY** and in **TASK** under Setup → Configuration → Users → User Log.

4 Calendar

Using the Calendar

With the Calendar option, Suite8 can keep track of future activities and tasks, and of critical dates and calendar periods, such as Bank Holidays, Easter and Christmas. By default only not completed tasks & activities are displayed but all or only completed tasks & activities can also be displayed by changing the search criteria.

Key features of the Calendar are:

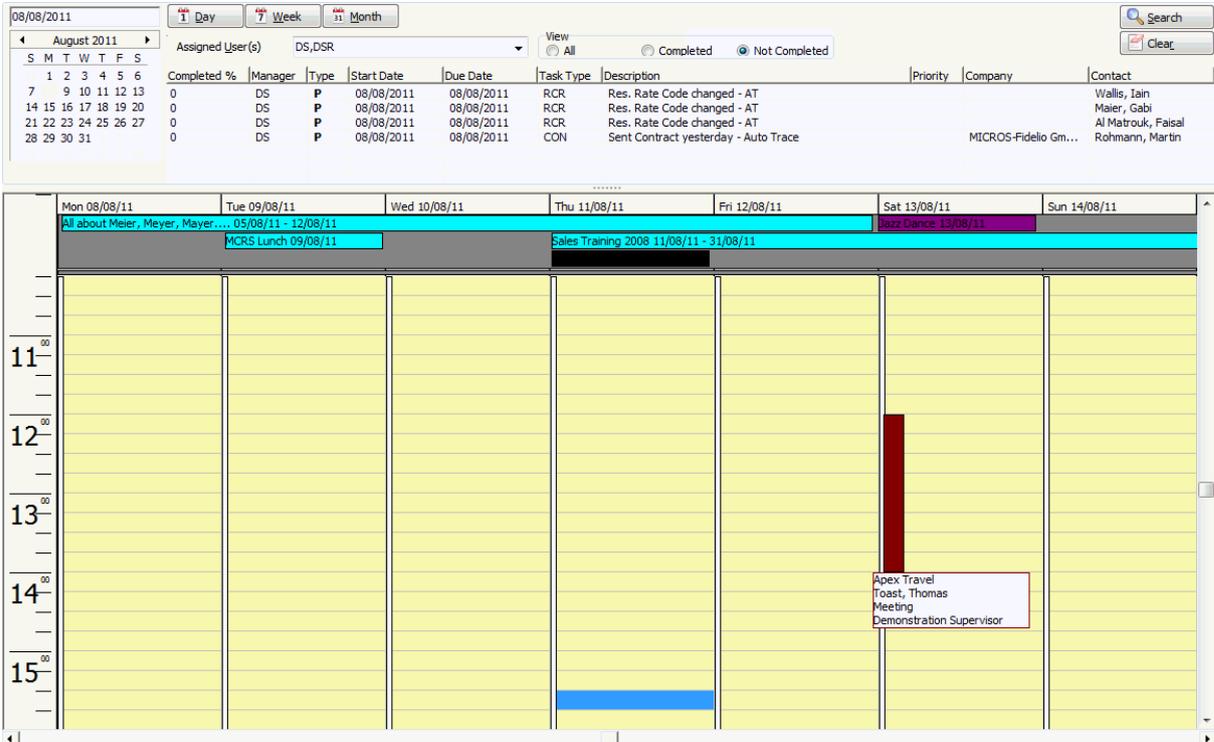
- Offers a day, week and month view with an adjustable time scale.
- Creation of new activities or edit/deletion of existing activities.
- Creation of new tasks or edit/deletion of existing tasks.
- Drag and drop functionality for activities.
- Events such as public holidays can be entered and viewed via the calendar.
- Conference bookings can be automatically added to the calendar as a calendar event.
- Activities are coloured for at-a-glance identification.

 To display conference bookings as calendar events select the parameter CONFERENCE BOOKINGS AS CALENDAR EVENTS under Setup → Configuration → Global Settings → CCM → Conference 1 tab.

How to view the calendar

Click the CUSTOMER RELATION menu and select CALENDAR, or press F4.

The Calendar screen is displayed.



The screenshot displays the Suite8 Calendar application. At the top, there are navigation buttons for 'Day', 'Week', and 'Month' views. A search bar and a 'Clear' button are also present. Below the navigation is a table of tasks with columns for 'Completed %', 'Manager', 'Type', 'Start Date', 'Due Date', 'Task Type', 'Description', 'Priority', 'Company', and 'Contact'. The table shows several tasks related to 'Res. Rate Code changed - AT' and 'Sent Contract yesterday - Auto Trace'. Below the table is a calendar grid for the week of August 8, 2011, to August 14, 2011. The grid shows various events, including 'All about Meier, Meyer, Mayer...', 'MCRS Lunch 09/08/11', 'Sales Training 2008 11/08/11 - 31/08/11', and 'Jazz Dance 13/08/11'. A tooltip is visible for an event on August 13, 2011, at 14:00, titled 'Apex Travel Toast, Thomas Meeting' with the role 'Demonstration Supervisor'.

Note: If the parameter USER ASSIGNMENT FOR TASKS & ACTIVITIES is activated under Global Settings → Profile tab then all assigned users are displayed by default in the ASSIGNED USERS box and all tasks & activities for those users are displayed. If no users are assigned then only the tasks & activities of the logged in user are displayed.

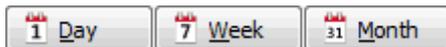
If the parameter is active and the user right ASSIGN USERS TO TASK & ACTIVITIES is active then users can be assigned under Configuration → Users → User Definition → Assign Users for T&A.

If the parameter is not active then users do not have to be assigned, the selection for MANAGER is empty and every user is able to see and work with all tasks & activities (depending on the user/owner rights). The MANAGERS to be displayed by default can be set under Miscellaneous → User Settings → Search Screens.

Changing the look of your Calendar

Change the Day/Week/Month view

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
2. Click the DAY, WEEK OR MONTH button to change the look of the calendar.



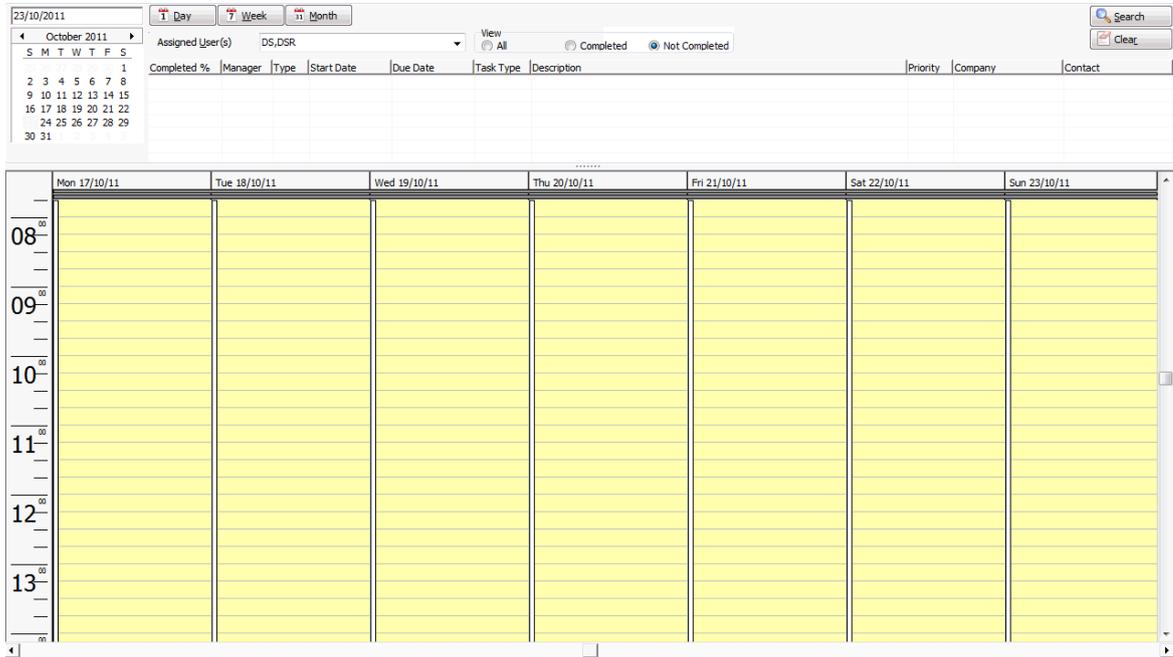
Change the time scale of the day and week view

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
2. Place the cursor on the anywhere on the calendar and right-click to display the short-cut menu.
3. Click 15 MINUTES, 30 MINUTES OR 60 MINUTES to change the time scale.

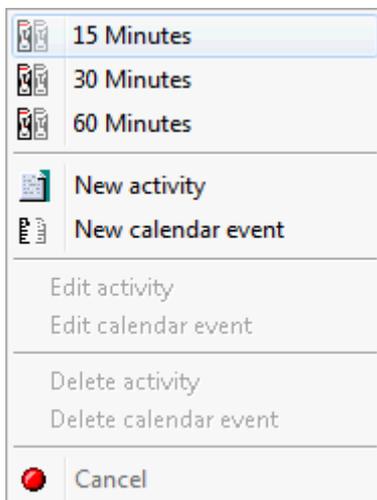
Calendar Events

New Calendar Event

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.



2. Place the cursor on the appropriate day and right-click to display the short-cut menu.



3. Click NEW CALENDAR EVENT on the shortcut menu to display the calendar event dialog box.

4. Type the date range for the calendar event in the DATE RANGE box **or** click the drop down arrow and select a date from the calendar.
5. In the TYPE box click the drop-down arrow and then select the event type.
6. In the DESCRIPTION box enter the description of the calendar event.
7. In the COLOUR box click the drop-down arrow and then select the colour in which the calendar event should be displayed.
8. In the NOTE box you can enter additional comments.
9. Click OK, the calendar event is displayed in the selected colour under the date field.

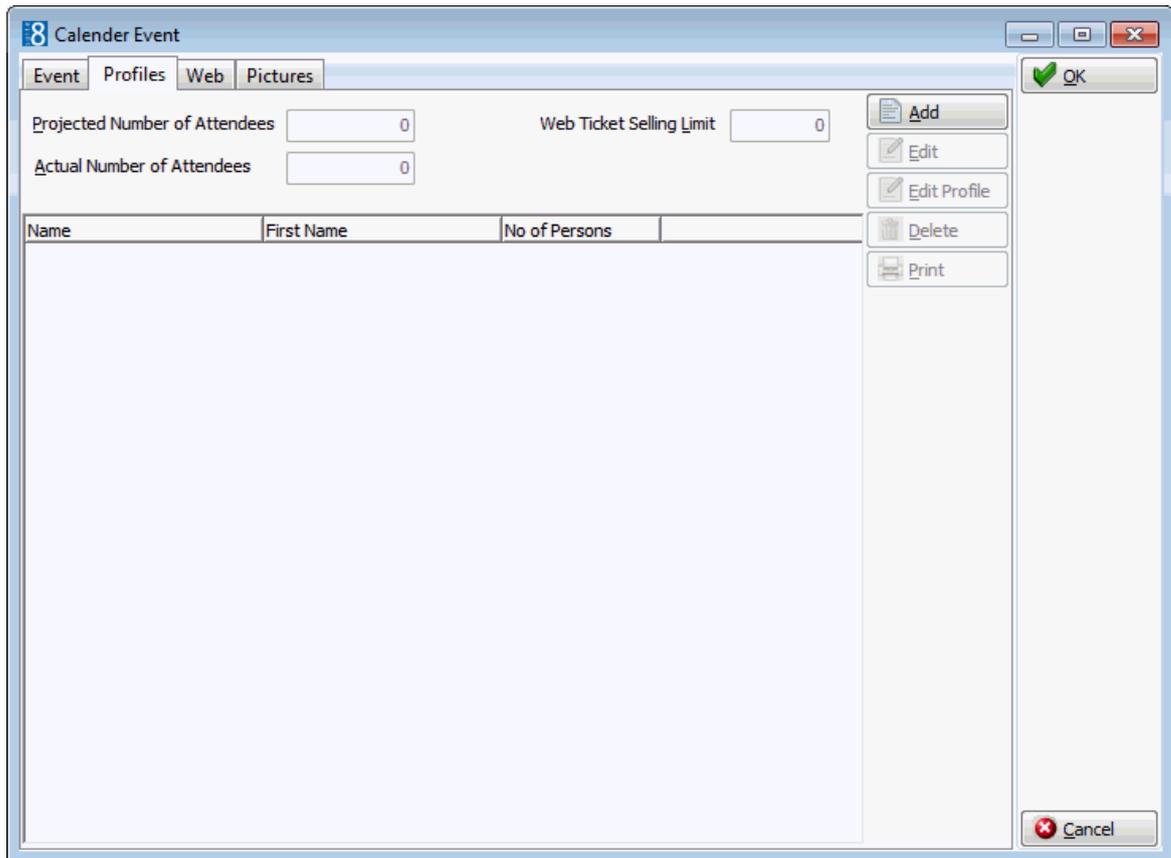
Note: A new event can also be entered by selecting CALENDAR EVENTS from the MISCELLANEOUS menu.

Linking Profiles to a Calendar Event

Customer profiles can be linked to a calendar event and displayed along with the calendar event on the report FCR_PMS_3906_CALENDAR_EVENTS.rpt.

How to link profiles to a calendar event

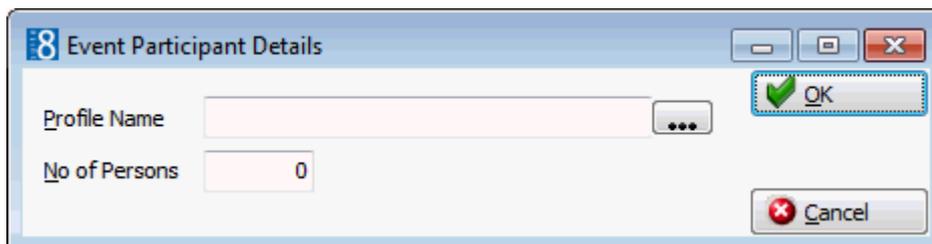
1. Select the PROFILES tab.



The screenshot shows the 'Calendar Event' dialog box with the 'Profiles' tab selected. The dialog has four tabs: 'Event', 'Profiles', 'Web', and 'Pictures'. The 'Profiles' tab contains the following fields and controls:

- Projected Number of Attendees:** A read-only text box containing the value '0'.
- Actual Number of Attendees:** A read-only text box containing the value '0'.
- Web Ticket Selling Limit:** A text box containing the value '0'.
- Buttons:** A vertical stack of buttons on the right side: 'Add', 'Edit', 'Edit Profile', 'Delete', and 'Print'.
- Table:** A table with three columns: 'Name', 'First Name', and 'No of Persons'. The table is currently empty.
- OK and Cancel buttons:** Located at the bottom right of the dialog.

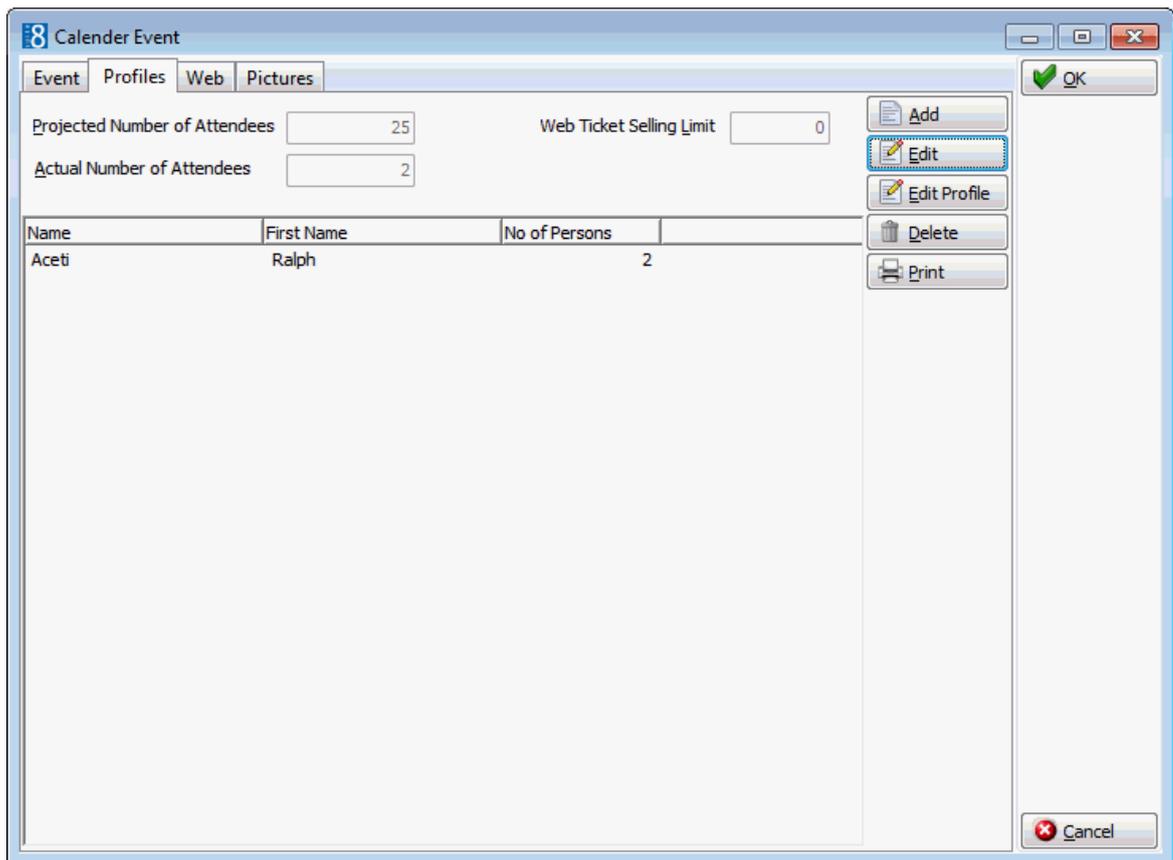
2. The PROJECTED NUMBER OF ATTENDEES is read-only; details are taken from the Event tab.
3. Enter the WEB TICKET SELLING LIMIT for tickets to be sold via the Suite8 homepage.
4. The ACTUAL NUMBER OF ATTENDEES is read-only and is completed based on the number of linked profiles.
5. Click ADD; the Event Participant Details dialog box is displayed.



The screenshot shows the 'Event Participant Details' dialog box. It contains the following fields and controls:

- Profile Name:** A text box with a search icon (three dots) to its right.
- No of Persons:** A text box containing the value '0'.
- Buttons:** 'OK' and 'Cancel' buttons are located at the bottom right of the dialog.

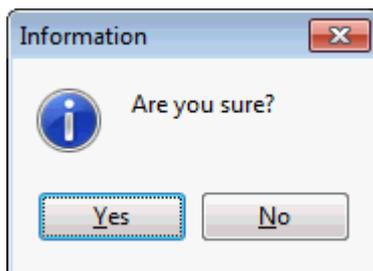
6. Use the  button to Locate the required profile.
7. Enter the No. of Persons associated with this profile.
8. Use the search criteria on the profile search screen to locate the required profile or create a new individual profile.
9. Click the OK button to add the profile to the calendar event.



10. Repeat steps 4 -6 to add additional profiles to the calendar event.
11. Click OK to close the Calendar Event dialog box.

How to delete linked profiles from a calendar event

1. Select the PROFILES tab.
2. Point to the profile to be deleted and click DELETE, a confirmation message is displayed.



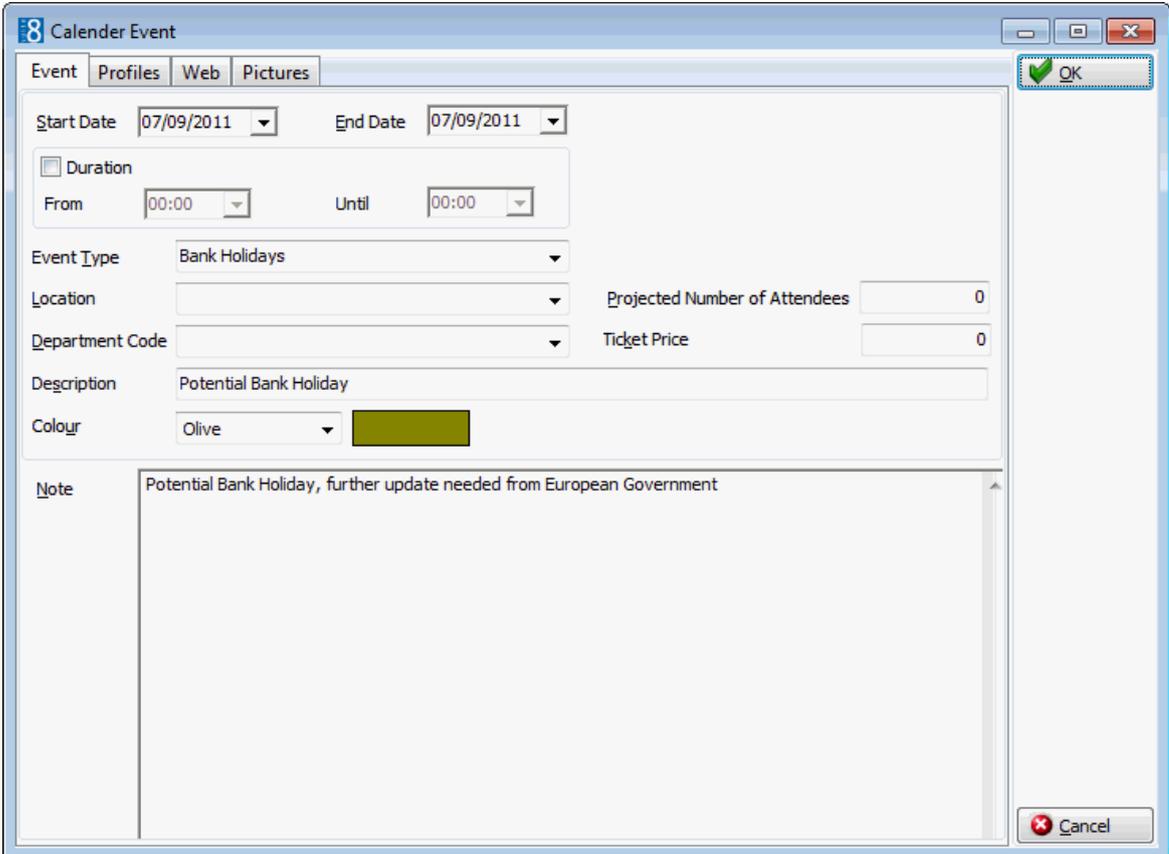
3. Click YES to remove the profile from the calendar event.
4. Click OK to close the Calendar Event dialog box.

Editing a Calendar Event

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
2. Point to the calendar event to be edited and double-click or right-click to display the short-cut menu.

	15 Minutes
	30 Minutes
	60 Minutes
	New activity
	New calendar event
Edit activity	
Edit calendar event	
Delete activity	
Delete calendar event	
	Cancel

3. Click EDIT CALENDAR EVENT, the calendar event dialog box is displayed.



Calendar Event

Event Profiles Web Pictures

Start Date: 07/09/2011 End Date: 07/09/2011

Duration: From 00:00 Until 00:00

Event Type: Bank Holidays

Location: Projected Number of Attendees: 0

Department Code: Ticket Price: 0

Description: Potential Bank Holiday

Colour: Olive

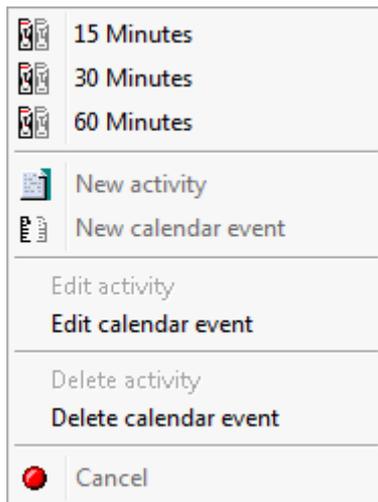
Note: Potential Bank Holiday, further update needed from European Government

OK Cancel

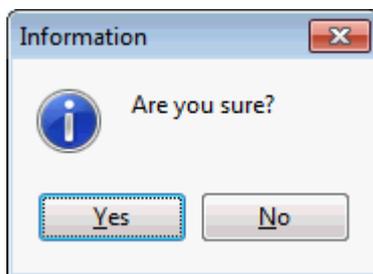
4. Make any changes necessary.
5. Click OK to save the changes.

Deleting a Calendar Event

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
2. Point to the calendar event to be deleted and right-click to display the short-cut menu.



3. Click DELETE CALENDAR EVENT, a confirmation message is displayed.



4. Click YES to delete the event.

Activities

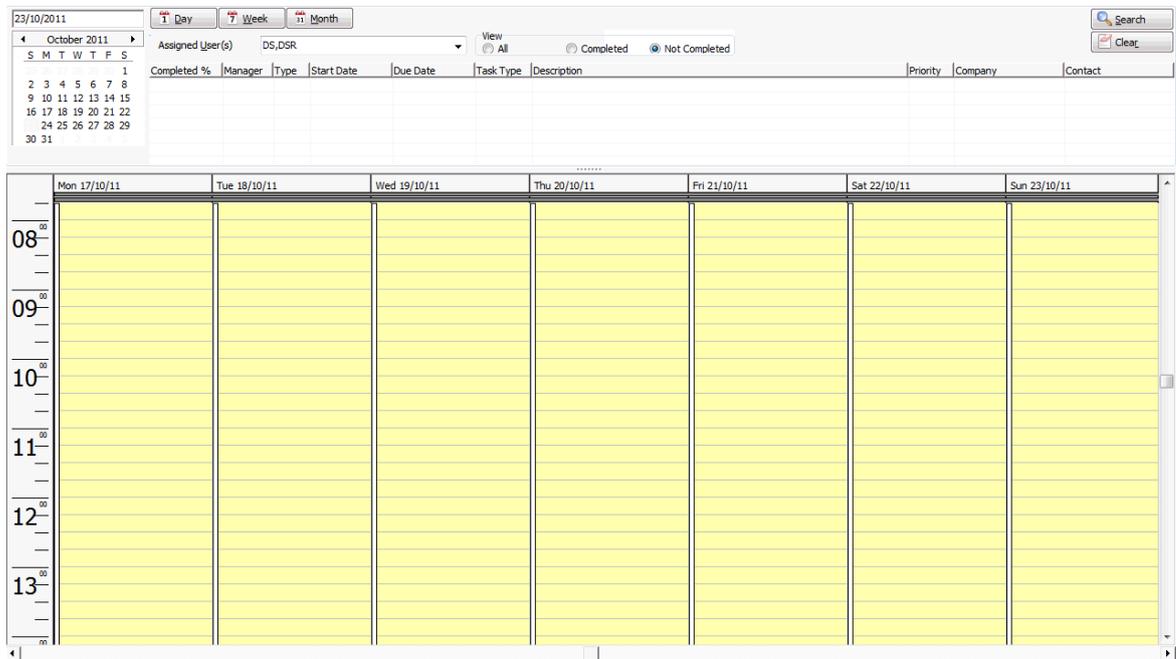
About Activities

Suite8 is capable of tracking any kind of activity. Generally activities are attached to a date and a specific time when they need to be carried out, but it is also possible to create an activity that is not linked to a time, it is then referred to as a Task. By default only not completed tasks & activities are displayed but all or only completed tasks & activities can also be displayed by changing the search criteria.

Activities are also linked to at least one manager (employee). It is mandatory to assign a manager as primary and optional to link additional managers as required. The Sales Manager logged on to the system is automatically marked as the primary assigned manager for the activity; however this can be changed as required.

New Activity

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.



2. Place the cursor on the appropriate day and right-click to display the short-cut menu.

	15 Minutes
	30 Minutes
	60 Minutes
	New activity
	New calendar event
Edit activity	
Edit calendar event	
Delete activity	
Delete calendar event	
	Cancel

3. Click NEW ACTIVITY on the shortcut menu to display the activity edit dialog box.

4. Complete the fields as detailed in the table below.
5. Click OK, the activity is displayed in the calendar screen.
6. Pointing the cursor at the activity displays an information box showing a summary of the activity details.

Activity	: Presentation
Company name	: MICROS-Fidelio GmbH
Contact	: Maier, Max
Period	: 05/09/11-05/09/11
Time	: 8:00 AM-8:00 AM
Activity type	: Presentation

Activity Edit dialog box

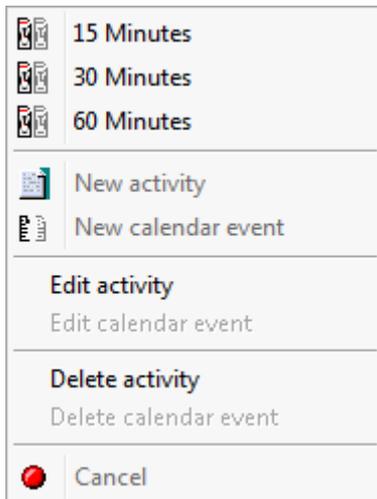
Fill in this field	With this information
Company Name	Link to a company profile.
Contact Name	Link to an individual (contact) profile.
Company T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected company are shown for one year in the past and one year in the future.
Contact T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected contact are shown for one year in the past and one year in the future.
Communication	Preferred communication method for the activity.
Booking ID	The ID number of the booking master. Note: This field is information only and is displayed only if the activity is linked to a conference booking.
Booking Name	The name of the conference booking. Note: This field is information only and is displayed only if the activity is linked to a conference booking.
Arrival Date	The arrival date or the booking. Note: This field is information only and is displayed only if the activity is linked to a conference booking.
Resp. Employee	Employee for whom this activity belongs.
Activity Type	Type of Activity.
Activity Description	Free format field to further define the purpose of the activity or to give a description of activity. By default the field is completed with the activity type as defined in the previous field.
All Day Event	Checking this field will mark the activity as an all day event. An activity marked as an all day event is displayed at the top of the column under the date field and not on the grid itself.
Check Availability	Select this checkbox to check availability when an activity is entered. If this option is active then each time an activity is entered for the resp. employee for that day and time, the availability message is displayed.
Start Date	The starting date of the activity.
Start Time	The starting time of the activity. The default starting time is defined in the Global Settings → Profile 1 tab.
End Date	The ending date of the activity.
End Time	The ending time of the activity. The default ending time is defined in the Global Settings → Profile 1 tab.
Show As	Selecting an entry from this list box shows whether the activity is taking place out of the office, if the Sales Manager is busy or free, etc.
Private	Checking this field will mark the activity as private.

	Note: Functionality not yet implemented.
Reminder	A reminder can be set, ranging from 5 minutes to one month. Users then have the option to choose to 'Dismiss' or 'Snooze' the activity.
Date Completed	Date the activity was completed - select from calendar.
	Free format field to add any additional notes or information.

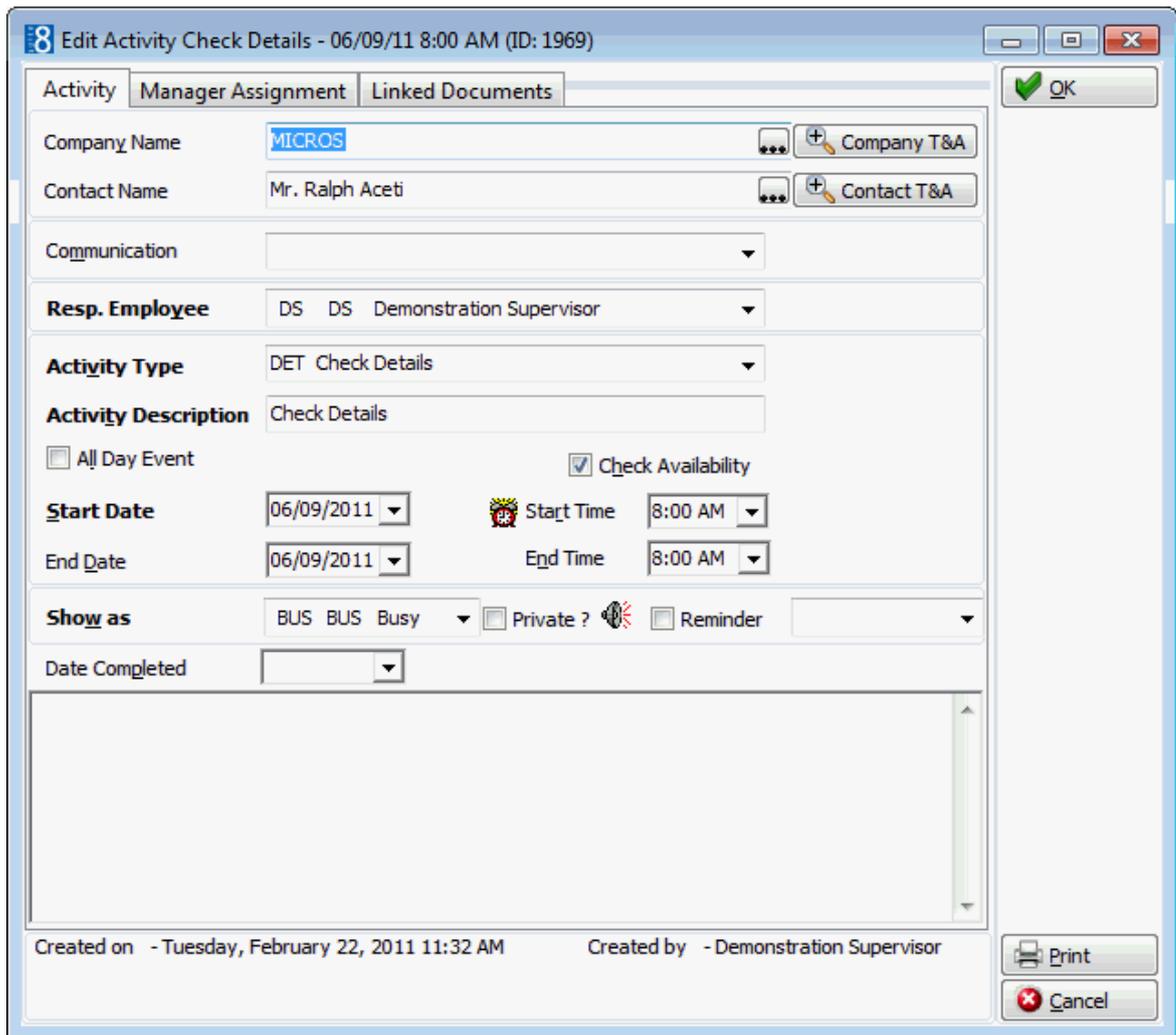
Note: A new activity can also be entered by drag and drop; place the cursor on the required date and start time and drag the cursor down to the end time, select NEW ACTIVITY from the shortcut menu and complete the fields as detailed above.

Editing an Activity

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
2. Point to the activity to be edited and double-click or right-click to display the short-cut menu.



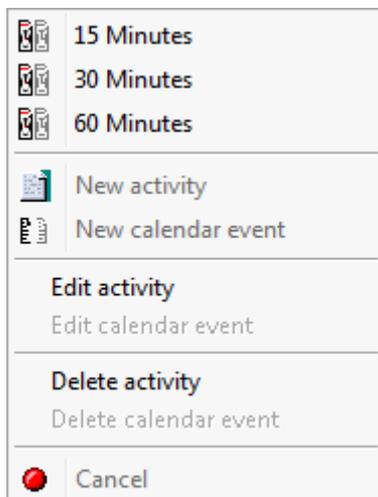
3. Click EDIT ACTIVITY, the activity event dialog box is displayed.



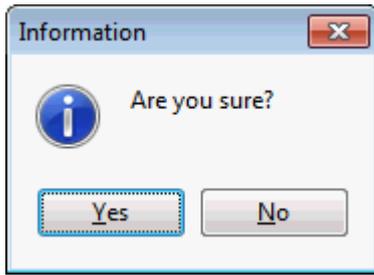
4. Make any changes necessary.
5. Click OK to save the changes.

Deleting an Activity

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
2. Point to the activity to be edited and right-click to display the short-cut menu.



-
3. Click DELETE ACTIVITY, a confirmation message is displayed.



4. Click YES to delete the activity.

Tasks

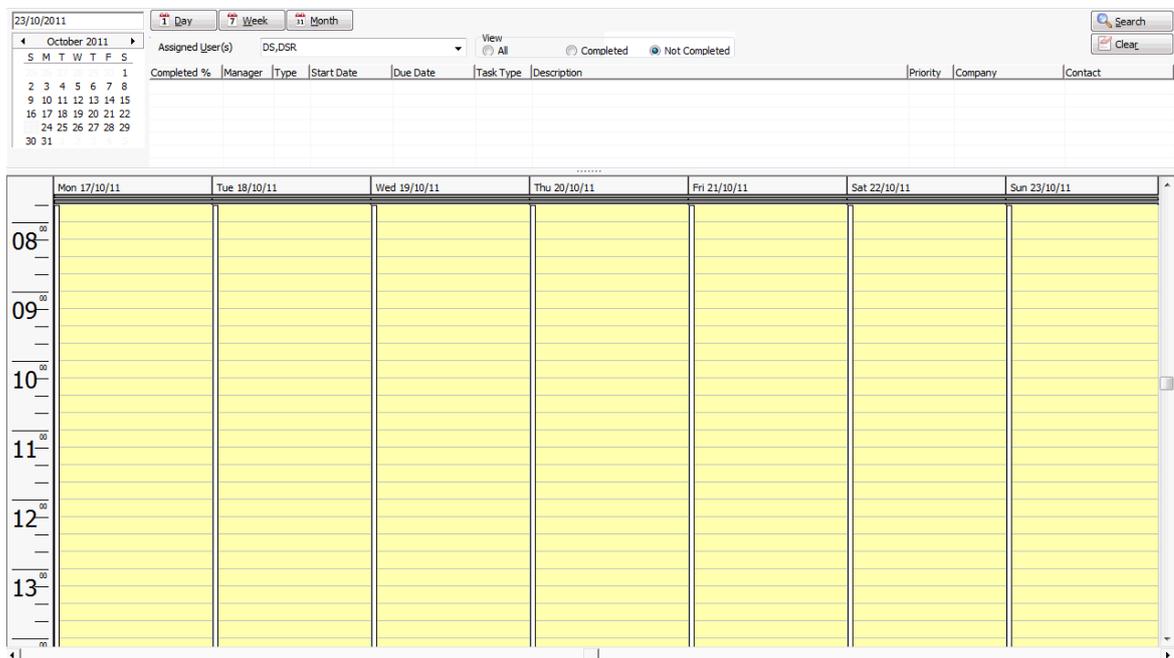
About Tasks

Version 8 is capable of tracking any kind of task. A task may be used for an activity that needs to be done but not necessarily at a specific time; it is more like a 'to do', a note or a reminder for e.g. preparing a mailing or calling a customer. A task has a start date and a due date but no specific time. By default only not completed tasks & activities are displayed but all or only completed tasks & activities can also be displayed by changing the search criteria.

Tasks are also linked to at least one manager (employee). It is mandatory to assign a manager as primary and optional to link additional managers as required. The Sales Manager logged on to the system is automatically marked as the primary assigned manager for the task; however this can be changed as required.

New Task

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.



2. Place the cursor on the upper section of the calendar screen and right-click to display the short-cut menu.



3. Click NEW on the shortcut menu to display the task dialog box.

4. Complete the fields as detailed in the table below.
5. Click OK, the task is displayed in the calendar screen.

Task dialog box

Fill in this field	With this information
Company Name	Link to a company profile.
Contact Name	Link to an individual (contact) profile.
Company T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected company are shown for one year in the past and one year in the future.
Contact T&A	Click this option to display the activity search screen. By default all the tasks and activities for the selected contact are shown for one year in the past and one year in the future.
Communication	Preferred communication method for the task.
Booking ID	The ID number of the booking master. Note: This field is information only and is displayed only if the task is linked to a conference booking.
Booking Name	The name of the conference booking.

	Note: This field is information only and is displayed only if the task is linked to a conference booking.
Arrival Date	The arrival date or the booking. Note: This field is information only and is displayed only if the task is linked to a conference booking.
Resp. Employee	Employee for whom this task belongs.
Task Type	Type of Task.
Description	Free format field to further define the purpose of the task or to give a description of task.
Check Availability	Select this checkbox to check availability when a task is entered. If this option is active then each time a task is entered for the resp. employee for that day, the availability message is displayed.
Start Date	Starting date of the task.
Status	The status of the task, e.g. Not Started, Deferred, etc.
% Completed	The % of the task completed.
Due Date	Due date of the task.
Priority	Task priority - Normal, Low, High.
Notes	Free format field to add any additional notes or information.
Date Completed	Date the task was completed - select from calendar. Also updates the STATUS field to completed and the field % COMPLETED to 100%.

Editing a Task

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
2. Point to the task to be edited and double-click or right-click to display the short-cut menu.

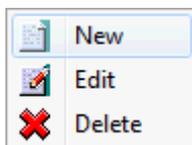


3. Click EDIT, the task dialog box is displayed.

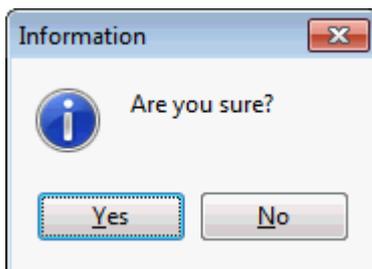
4. Make any changes necessary.
5. Click OK to save the changes.

Deleting a Task

1. Click the CUSTOMER RELATION menu and select CALENDAR, or press F4 to display the Calendar screen.
2. Point to the task to be deleted and right-click to display the short-cut menu.



3. Click DELETE, a confirmation message is displayed.



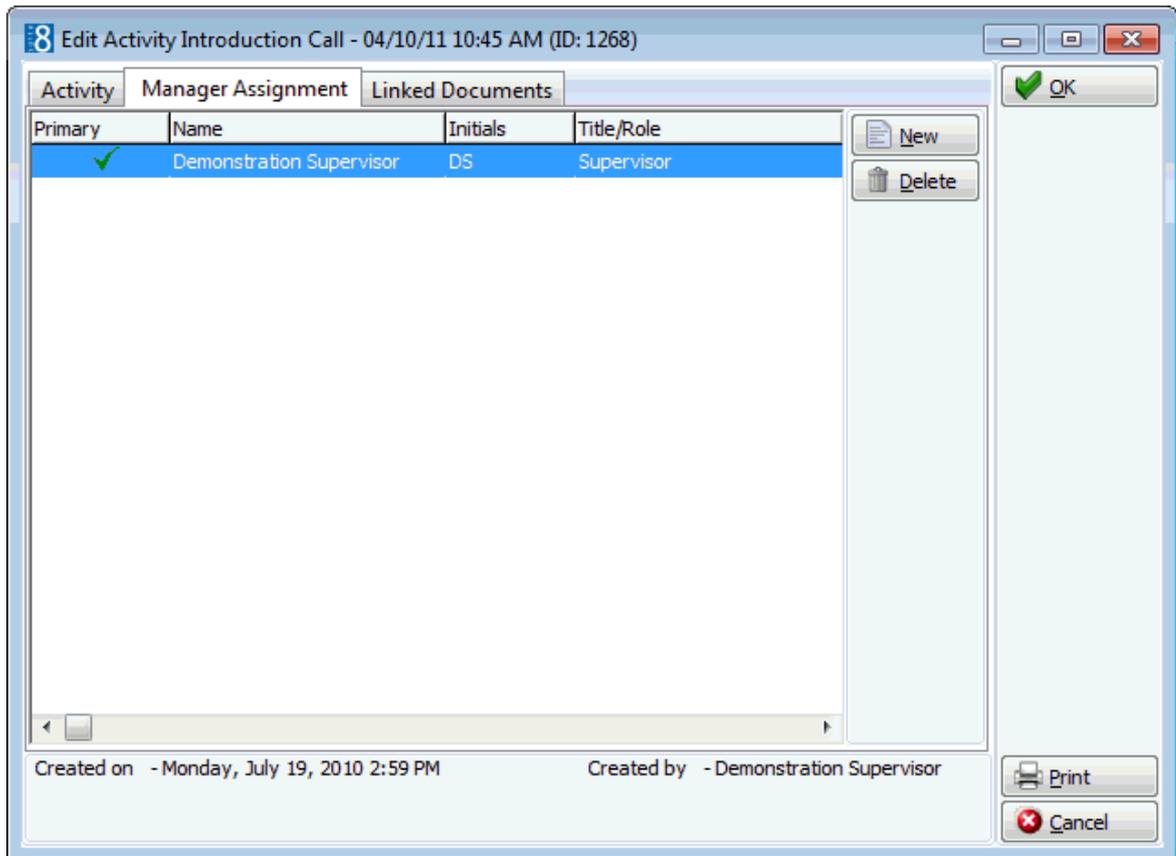
4. Click YES to delete the task.

Manager Assignment

The RESP. EMPLOYEE entered for the task or activity is automatically marked as the primary assigned manager. However, it is possible to link an unlimited number of managers.

How to add a new manager

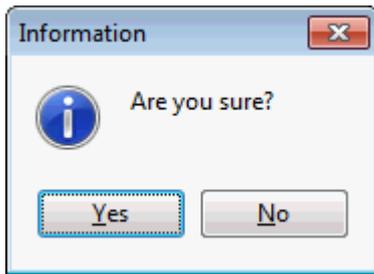
1. Display either the ACTIVITY or TASK dialog box.
2. Select the MANAGER ASSIGNMENT tab.



3. Click NEW, the Unassigned Managers dialog box is displayed.
4. Select the check box next to the required manager's name.
5. Click OK.

How to delete a manager assignment

1. Display either the TASK or ACTIVITY dialog box.
2. Select the MANAGER ASSIGNMENT tab.
3. Select the manager assignment to be deleted and click DELETE, a confirmation message is displayed.



4. Click YES to delete the manager assignment.

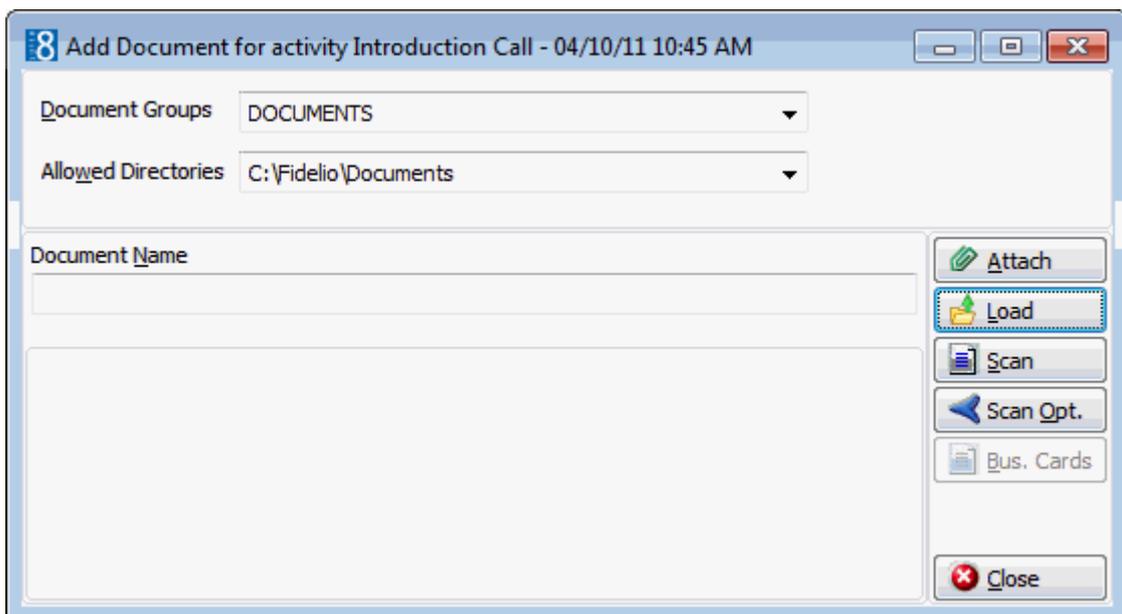
Linked Documents

This option enables the user to view, edit or add different types of documents to a profile, task or activity. It is recommended to place these documents on a shared network path to which all users have access. If a scanner is connected to the workstation you can also scan and attach documents such as contracts, letters or pictures. The scanner needs to be 'Twain' compatible.

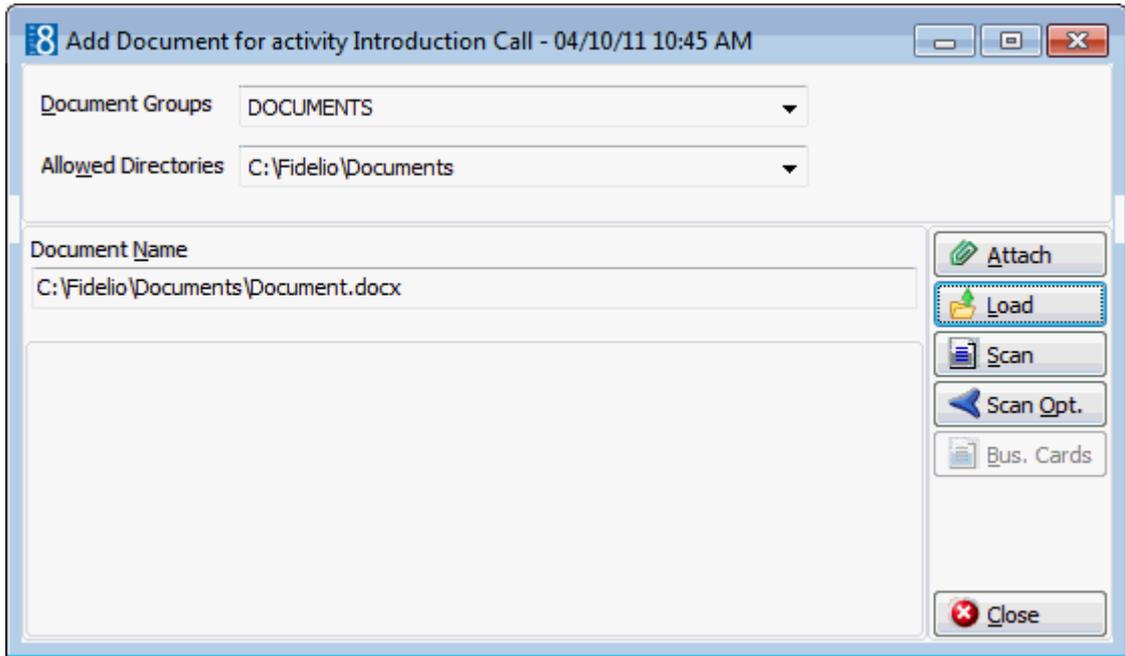
Note: The linked documents dialog box may be viewed from various access points, access is via the linked documents tab or via the options button, if available.

How to link a document

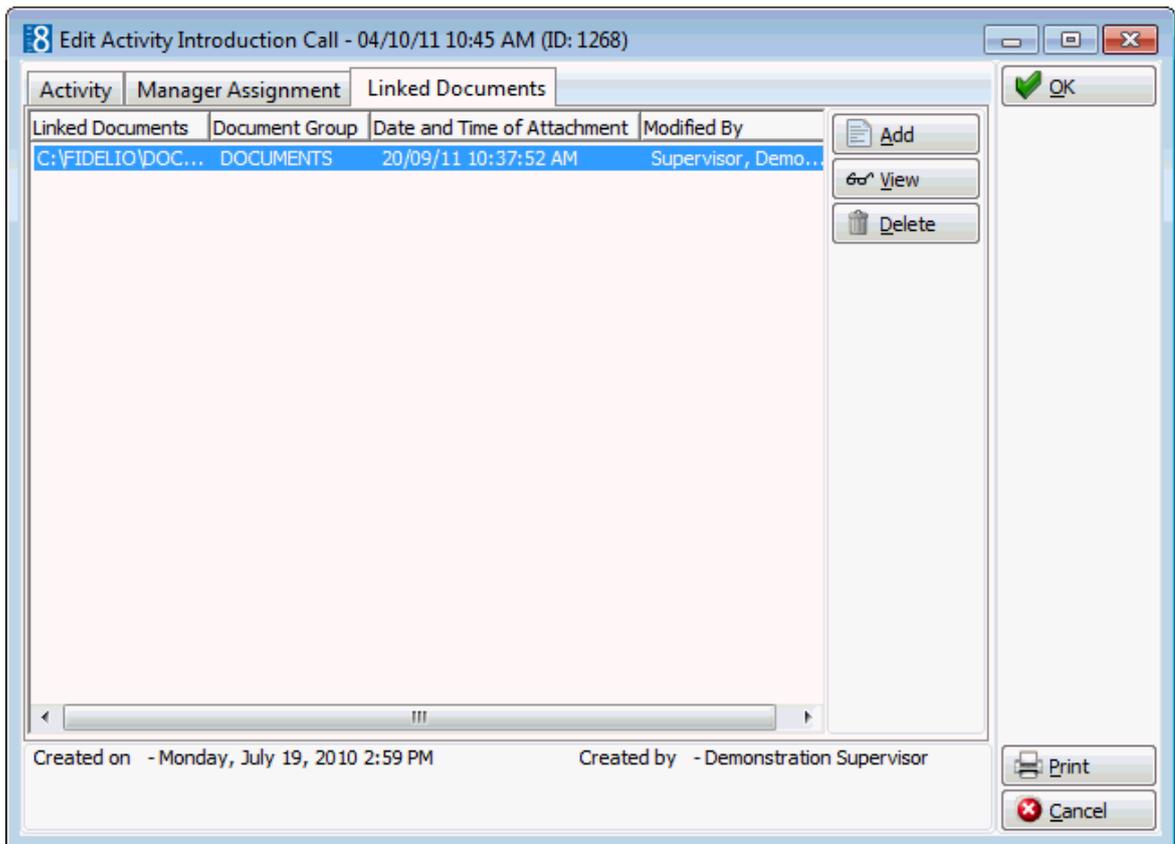
1. Select the LINKED DOCUMENTS tab.
2. Click ADD, the Attach documents dialog box is displayed.



3. In the DOCUMENT GROUPS list, select the document group required.
4. In the ALLOWED DIRECTORIES list, select the allowed directory required.
5. Click LOAD to display the list of documents.
6. Select the required document and click OPEN, the Document Name field is filled.



- To attach the document, click ATTACH, the document is shown as linked on the linked documents tab.



Note: Pictures or images may be attached in JPG or BMP format. The default setting is JPG, but this may be changed via the OPTIONS button. The selected settings will be saved for that user.

How to view/edit a linked document

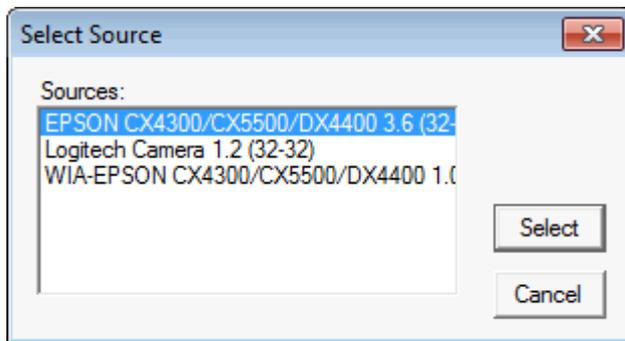
1. Select the LINKED DOCUMENTS tab.
2. Select the document and click VIEW.

Suite8 opens the relevant application, for example, Word if the document is a Word document.

Note: The document may be edited directly from within the opened application.

How to scan and link a document

1. Select the LINKED DOCUMENTS tab.
2. Click ADD, the attach documents dialog box is displayed.
3. In the DOCUMENT GROUPS list, click the document group required.
4. In the ALLOWED DIRECTORIES list, click the allowed directory required.
5. Click SCAN, the select source dialog box is displayed.



6. Select the source and click SELECT to open the scanner application.
7. Scan the document.
8. Click ATTACH to link the scanned document.

 Document groups and path are defined via the option DOCUMENT TYPES under Setup → Configuration → Miscellaneous.

 Adding or editing documents on the linked documents tab is controlled by the user right LINKED DOCUMENTS under Setup → Configuration → Users → User Definition → Rights → Customer Profiles → Attach documents.

Standard & Advanced Mailings

Fidelio Suite8 offers two types of mailings: Standard and Advanced.

The standard mailing allows users to enter values in a number of pre-defined fields from customer profiles, group/block and individual reservations, conference bookings, tasks and activities. The advanced mailing enable users to build queries based on pre-defined views, fields and values, with the possibility to create additional views at any time.

A translation tool ensures that the field descriptions can be translated into multiple languages.

Once a mailing query has been set up, it can be run at any time. All the matching records will be displayed and can be sorted as required. Users will have the ability to select records for processing; the selected records can then either be included or excluded in the mailing.

After a mailing query has been processed, users will be able to select from a field list the fields to use in their mailing merge. Fields that will be used for the mail merge such as company name, street, city, zip code etc. can be taken from a pre-defined view. This approach offers great flexibility as the view can be changed at any time and more fields can be added if necessary.

With the Mailing Option, you can:

- Create a standard mailing query using the mailing wizard
- Create an advanced mailing query
- Send out form letters and forms
- Create and print merge files, using Word or Excel
- Send mailings via email to selected profiles
- Send a mailing to in-house guests
- Print labels and envelopes
- Create tasks for all customer profiles included in the mailing

Overview

The creation of a mailing is a 4 step process:

<p>Create Mailing Query Using the standard or advanced option.</p>		<p>Step 1: Define the selection of the records based on query options such as all customers with the mailing code "Christmas Card".</p>
↓		↓
<p>Select the field list</p>		<p>Step 2: Via the field list the information that is used for the data merge is defined. Example: customer name, street, city, country, letter greeting, etc.</p>
↓		↓
<p>Select the profile criteria</p>		<p>Step 3: Define the profile criteria such as the linking options or checking if an address exists, etc.</p>
↓		↓
<p>Merge the data Create a new letter or use an existing one.</p>		<p>Step 4: Place the merge fields into the document and perform the data merge.</p>

Creating a Standard Mailing

From the standard query screen you can edit an existing query or create a new query. You can also copy an existing query and then edit it to make any changes necessary. The list of available queries can be ordered as required by using the up and down arrow buttons. The description field is mandatory otherwise all fields as detailed below are optional.

To create a new standard mailing query:

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.

The screenshot shows the 'Mailing' dialog box with the 'Standard query' tab selected. The 'Standard query information' section is visible, listing various fields and their values. The fields are:

Field	Value
PROFILE	
Company	Individual
Zip Code	
City	
Country	
State	
Profile Type	Company,Company
Created	
Created by	
Sales Manager	
Language	
Birthday	
Wedding Day	
Active?	Yes
Include No Mailing?	No
Action Code	
Competition Code	
Industry Code	
Influence	
Mailing Codes	
Market Segment	
Newspaper	
Potentials	
Priority	
Product Interest	
Scope	
Scope City	
Source	

2. From the Mailing dialog box, select the tab STANDARD QUERY.
3. Click NEW, the standard query dialog box appears.

The default selections are as follows:

- To search for active profiles but not to include individuals whose profile is marked as 'No Mailing', however, this may be changed via the add/edit query definition dialog box.
- All information that is entered is considered as an AND relation.
- Values selected from the same drop down lists and the C + I flag are considered as OR.
- The reservation status DEFINITE is taken as the default when running a query where reservations are included.

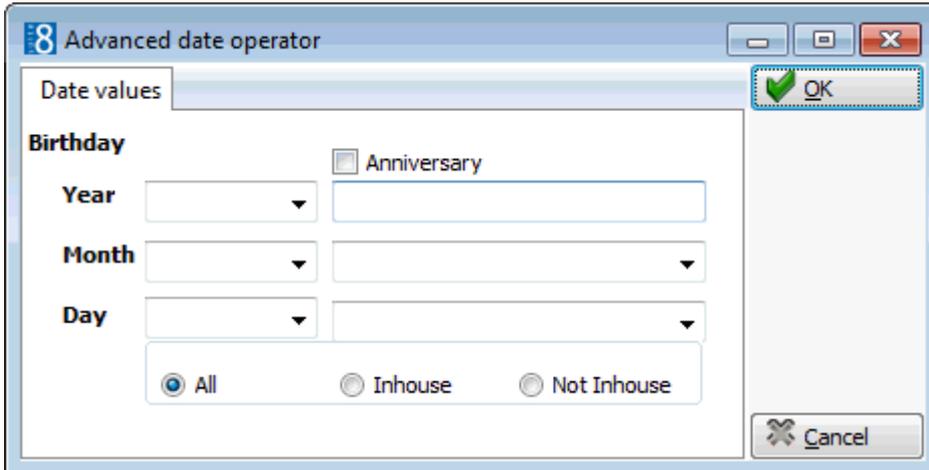
4. Enter a description for the mailing query.
5. Fill in the limiting criteria for your mailing list.
 - Profile Information Criteria
 - Profile Marketing Information Criteria
 - Reservation Criteria
 - Conference Booking Criteria
 - Tasks / Activities Criteria
6. Click OK to save the query.

Profile Information Criteria

This Field	Is to limit a mailing to
C	Select this checkbox to select if the criteria should be on the company profile level. Either company or individual must be selected if an entry is made in a field which has the C and I checkboxes.

I	Select this checkbox to select if the criteria should be on the individual profile level. Either company or individual must be selected if an entry is made in a field which has the C and I checkboxes.
Company: From-To	Companies whose names fall within the alphabetical range entered. Leaving the From and To fields blank means not to restrict the mailing to a certain range of the alphabet.
Individual: From-To	Individuals whose names fall within the alphabetical range entered. Leaving the From and To fields blank means not to restrict the mailing to a certain range of the alphabet.
ZIP Code: From-To	Certain regions. For example, if the range is 94700-94799, the mailing is limited to profiles from the San Francisco area.
City	Certain Cities. The mailing is limited to the city name entered.
Country	Individuals or companies from one or more particular countries. To restrict the mailing to individuals or companies from the USA and Canada, for instance, select USA and Canada from the drop-down list.
State	Certain States. The mailing is limited to the states selected.
Profile Type	Certain profile types. Select the profile types from the drop-down list.
Created From-To	The date the profile was created. Select a date from the calendar list box or enter a date range from / to.
Created by	Certain users. Select the users from the drop-down list.
Sales Manager	Search by responsible Sales Manager. Select the Sales Manager from the drop-down list.
Language	Certain Language codes. Select the language codes from the drop-down list.
Birthday	Click on DEFINE to enter the year, month and day of birth. Date fields can be further defined via the Advanced Date Operator dialog box, see the table below.
Wedding	Click on DEFINE to enter the wedding year, month and day. Date fields can be further defined via the Advanced Date Operator dialog box, see the table below.
Active	Select this checkbox if only active profiles should be included. The default is checked, i.e. include only active profiles.
include No mailing	Select this checkbox if you want to include those individuals who are marked as 'No Mailing'. The default is not selected, i.e. do not include individuals whose profile is marked as 'No Mailing'.
include No mailing	Select this checkbox if you want to include those individuals who are marked as 'No E-Mailing'. The default is not selected, i.e. do not include individuals whose profile is marked as 'No E-Mailing'.

Advanced Date Operator dialog box



This Option	Defines
Anniversary	Enables the definition of one or multiple years instead of entering a specific year. This could be used for anniversaries such as 50th or 60th birthdays. Note: This option is only available for the Birthday and Wedding Day fields.
Year	Defines the year for the date value. Multiple years may be entered separated by a comma.
Month	Defines the month for the date value. Multiple months may be entered separated by a comma.
Day	Defines the day for the date value. Multiple days may be entered separated by a comma.
All	Includes all individuals regardless of whether they are in-house or not. Note: This option is only available for the Birthday and Wedding Day fields.
In-house	Includes in-house guests. Note: This option is only available for the Birthday and Wedding Day fields.
Not In-house	Excludes in-house guests. Note: This option is only available for the Birthday and Wedding Day fields.

Profile Marketing Information Criteria

This Field	Is to limit a mailing to:
C	Select this checkbox to select if the criteria should be on the company profile level. Either company or individual must be selected if an entry is made in a field which has the C and I checkboxes.
I	Select this checkbox to select if the criteria should be on the individual profile level. Either company or individual must be selected if an entry is made in a field which has the C and I checkboxes.

Action codes	Certain action codes. Select the action codes from the drop-down list.
Competition	Certain competition codes. Select the competition codes from the drop-down list.
Industry codes	Certain industry codes. Select the industry codes from the drop-down list.
Influence	Certain influence, such as Booker, Contact or Negotiator. Select the influences from the drop-down list.
Mailing Codes	Certain mailing codes: Christmas mailing, summer mailing, new rates mailing, etc. Select the mailing codes from the drop-down list.
Market Segment	Certain market segments. Select the market segments from the drop-down list.
Newspaper	Certain newspaper preferences. Select the newspapers from the drop-down list.
Potentials	Certain potential codes. Select the potential number of room nights/bookings from the drop-down list.
Priority	Certain priority codes. Select the priority codes from the drop-down list.
Product interest	Certain product interest codes. Select the product interest codes from the drop-down list.
Scope	Certain scopes such as National, International. Select the scopes from the drop-down list.
Scope City	Certain scope city codes. Select the scope city codes from the drop-down list.
Source	Certain source codes. Select the sources from the drop-down list.
Specials	Certain special codes. Select the special codes from the drop-down list.
VIP Code	Certain VIP codes. Select the VIP codes from the drop-down list.
Rate Code	Certain rate codes. Select the rate codes from the drop-down list.
More Fields	<p>This option is only displayed if custom attributes have been defined. Click on the MORE FIELDS button to select from a list of user-defined attributes.</p> <p>Note: When this button is displayed in red it indicates that an attribute has been selected.</p>

Reservation Criteria

This Field	Is to limit a mailing to
Groups	Members of the specified groups. Select the group names from the drop-down list.
Blocks	Members of the specified blocks. Select the block names from the drop-down list.
In-house Guests: From-To	Guests who were in-house within the specified range of dates.

Arrival: From-To	Individuals or companies who arrived within the specified range of dates.
Departure: From-To	Individuals or companies who departed within the specified range of dates.
# of Nights: From-To F	Individuals or companies with a number of room nights within the specified range. Includes also those checked in today. Select the option F to include future reservations.
# of Stays: From-To F	Individuals or companies who stayed at the hotel within the specified range. Includes also those checked in today. Select the option F to include future reservations.
Forecast: From-To	Individuals or companies whose forecasted revenue is within the specified range.
Posted Revenue: From-To	Individuals or companies whose posted revenue is within the specified range.
Rate Code	Certain rate codes. Select the rate codes from the drop-down list.
Source	Certain source codes. Select the source codes from the drop-down list.
Market	Certain market segments. Select the market segments from the drop-down list.
More Fields	Certain reservation attributes. Click on the MORE FIELDS button to select from a list of user-defined reservation attributes. Note: When this button is displayed in red it indicates that an attribute has been selected.
Display only individuals linked to reservations	If a company meets the query criteria then all individuals linked to that company will be displayed. Select this checkbox if you want to display only individuals from the company that are linked to the reservation. The default is not checked, i.e. display all individuals regardless if they are linked to this reservation or not.

Conference Booking Criteria

This Field	Is to limit a mailing to
In house guests: From- To	Individuals or companies that are already in house until the specified departure date.
Arrival: From-To	Individuals or companies that arrived within the specified range of dates.
Departure: From-To	Individuals or companies that departed within the specified range of dates.
Conference Status	Certain conference status codes. Select the conference status codes from the drop-down list.
Room Status	Certain room status codes. Select the room status codes from the drop-down list

Account Manager	Certain account managers. Select the account managers from the drop-down list.
Conf. Manager	Certain conference managers. Select the conference managers from the drop-down list.
Rooms Manager	Certain room managers. Select the rooms managers from the drop-down list.
Market	Certain market segments. Select the market segments from the drop-down list.
Source	Certain source codes. Select the source codes from the drop-down list.
Display only individuals linked to booking	If a company meets the query criteria then all individuals linked to that company will be displayed. Select this checkbox if you want to display only individuals from the company that are linked to the booking. The default is not checked, i.e. display all individuals regardless if they are linked to this booking or not.

Tasks / Activities Criteria

This Field	Is to limit a mailing to
Type	Certain task/activity types. Select the task/activity types from the drop-down list.
Start Date: From-To	The task/activity start date is within the specified range of dates.
End Date: From-To	The task/activity end date is within the specified range of dates.
Resp. Employee	Certain responsible employees. Select the employees from the drop-down list.
Description	Tasks/Activities with this description.
Display only individuals linked to activity	If a company meets the query criteria then all individuals linked to that company will be displayed. Select this checkbox if you want to display only individuals from the company that are linked to the task/activity. The default is not checked, i.e. display all individuals regardless if they are linked to this task/activity.
Completed / Uncompleted	Select completed to include only completed tasks/activities. Select uncompleted to include only uncompleted tasks/activities.

Creating an Advanced Mailing Query

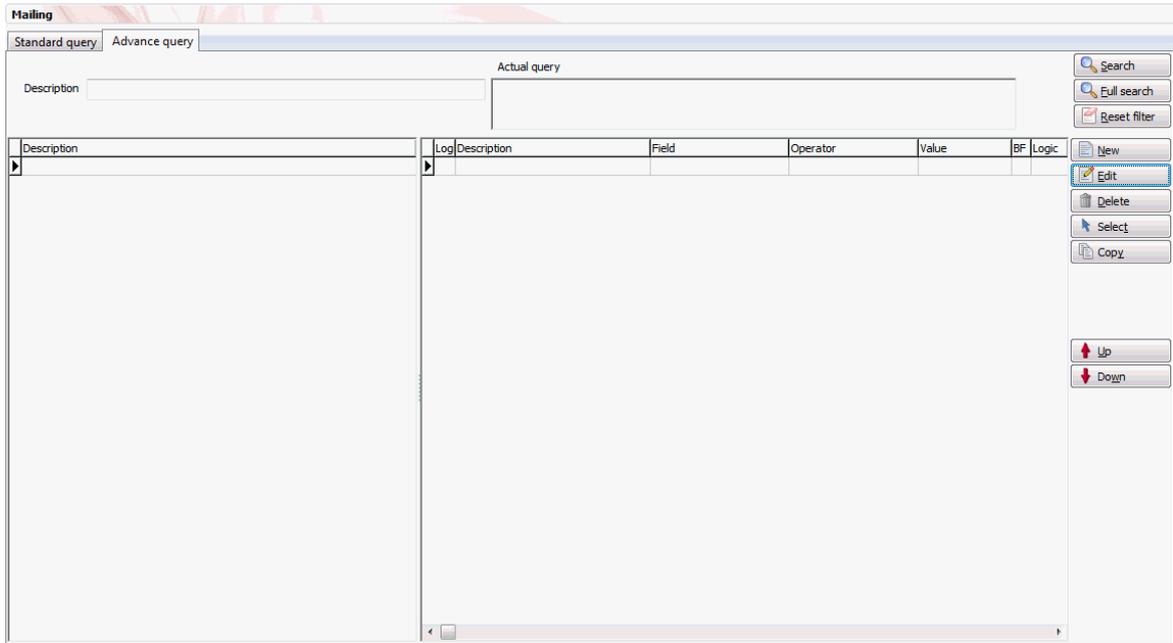
From the Advanced Query screen you can edit an existing query or create a new query. You can also copy an existing query and then edit it to make any changes necessary. The list of available queries can be ordered as required by using the up and down arrow buttons. The description field is mandatory otherwise all fields as detailed below are optional.

The default selections are as follows:

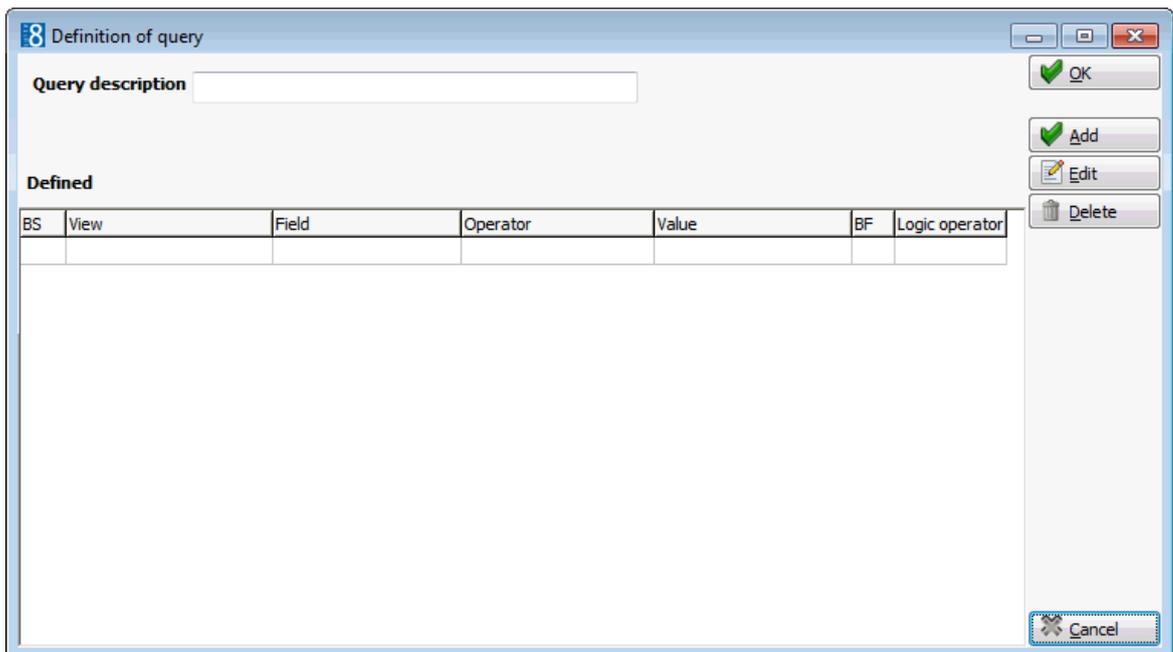
- To search for active profiles but not to include individuals whose profile is marked as 'No Mailing', however, this may be changed via the add/edit query definition dialog box.
- All information that is entered is considered as an AND relation.
- Values selected from the same drop down lists and the C + I flag are considered as OR.
- The reservation status DEFINITE is taken as the default when running a query where reservations are included.

To create a new advanced mailing query

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.
2. From the Mailing dialog box, select the tab ADVANCED QUERY.



3. Click NEW, the Definition of query dialog box appears.



4. In the QUERY DESCRIPTION box enter a name for the query.
5. Click ADD to build the query, the Add/Edit query definition dialog box appears.

6. Complete the fields as detailed in the Add/Edit query definition and Mailing Operators tables below.
7. Date fields can be further defined via the Advanced Date Operator dialog box, see the table below.
8. Click OK.
9. Repeat from step 5 for each additional condition required.
10. Depending on the fields selected for the query additional options may be displayed when running a query for tasks & activities, conference bookings or reservations:
 - Display only individuals linked to tasks, activities, conference bookings or reservations. If a company meets the query criteria then all individuals linked to that company will be displayed. Select this checkbox if you want to display only individuals from the company that are linked to an activity, task, conference booking or reservation.
 - Future Nights - includes future nights in the query results. Only valid when running queries where reservations are included.
 - Future Stays - includes future stays in the query results. Only valid when running queries where reservations are included.
11. When all conditions have been entered click OK.

Note: The last defined condition must have no logical operator selected.

Add/Edit query definition dialog box

This option	Does this
Left parenthesis	Lets you select single or double left parenthesis if required. Usually required for complex queries such as (profiles with country=Germany and priority=A) OR (profile with country=Switzerland and priority=B).
Views	Lets you select the view the query should be based upon.
Fields	Lets you select specific fields for the query.
C	Select this checkbox to select if the criteria should be on the company profile level. Either company or individual must be selected if a field is selected which has the C and I checkboxes. Note: This checkbox is only displayed for certain query fields.
I	Select this checkbox to select if the criteria should be on the individual profile level. Either company or individual must be selected if a field is selected which has the C and I checkboxes. Note: This checkbox is only displayed for certain query fields.
Operator	Lets you select an operator such as, is exactly equal to, is less than, is an empty field, etc. See Operator table.
Value	Lets you select the valid options. The choices depend on the type of field selected: Option 1: Choice between 2 pre-defined values. Option 2: Choice from a list of pre-defined values such as country codes. Option 3: Entry of a free-format value, e.g. if the field selected is city then a valid value would be a city name such as Hamburg. Option 4: If the condition 'is an empty' field then the value field may be left blank.
Right Parenthesis	Lets you select single or double right parenthesis if required.
Logical Operator	Specifies the logical operator for the next connection. AND the first condition and the next condition must both be true. OR either the first or the second condition must be true. BLANK no logical operator selected.

Mailing Operators table

This Operator	May be used:	Example
is exactly equal to (Value is mandatory)	This operator may be used for fields where the entry is selected from a list box or for fields which contain free-format text.	Mailing Code is exactly equal to XMC will select only profiles that have the code XMC selected.

		Company Name 1 is exactly equal to Micros will select only profiles with the exact name Micros. Micros Fidelio will not be displayed as it is not the exact name.
is not exactly equal to (Value is mandatory)	This operator may be used for fields where the entry is selected from a list box or for fields which contain free-format text.	Mailing Code is not exactly equal to XMC will select only profiles that do not have the code XMC selected. Company Name 1 is not exactly equal to Micros will select only profiles that do not have the exact name Micros. Micros Fidelio will be displayed as it is not the exact name.
is an empty field (Value is not mandatory)	This operator may be used for fields where the entry is selected from a list box or for fields which contain free-format text.	Profile Mailing code is an empty field will select all profiles where no mailing code has been entered. Department is an empty field will select all profiles which have no value in the department field.
is not an empty field (Value is not mandatory)	This operator may be used for fields where the entry is selected from a list box or for fields which contain free-format text.	Profile Mailing code is not an empty field will select all profiles where at least one mailing code has been entered. Department is not an empty field will select all profiles which have some value in the department field.
is greater than (Value is mandatory)	This operator may be used for value or date fields. It should not be used for fields where the entry is selected from a list box.	Profile zip code is greater than 89000 will select all profiles with a zip code above 89000. Reservation Posted revenue is greater than 90,000 will select all reservations where the posted revenue is greater than 90,000.
is greater than or equal to (Value is mandatory)	This operator may be used for value or date fields. It should not be used for fields where the entry is selected from a list box.	Arrival date is greater than or equal to 01.06.2006 will select all reservations where the arrival date is either on or after June 1st 2006.

is less than (Value is mandatory)	This operator may be used for value or date fields. It should not be used for fields where the entry is selected from a list box.	Profile zip code is less than 89000 will select all profiles with a zip code below 89000.
is less than or equal to (Value is mandatory)	This operator may be used for value or date fields. It should not be used for fields where the entry is selected from a list box.	Arrival date is less than or equal to 01.06.2006 will select all reservations where the arrival date is either on or before June 1st 2006.
is like (Value is mandatory)	This operator is used to search fields where the entry in the field starts with the entered value. This operator may be used for fields which contain free-format text. It should not be used for fields where the entry is selected from a list box.	Company Name 1 is like Fidelio will select only profiles which begin with Fidelio, e.g. Micros Fidelio will not be displayed because the name does not start with Fidelio.
is not like (Value is mandatory)	This operator is used to search fields where the entry in the field does not start with the entered value. This operator may be used for fields which contain free-format text. It should not be used for fields where the entry is selected from a list box.	Company Name 1 is not like Fidelio will select profiles which do not begin with Fidelio, e.g. Fidelio Software will not be displayed because the name starts with Fidelio.
contains text (Value is mandatory)	This operator is used to search fields where the entered value is contained somewhere in the selected field. This operator may be used for fields which contain free-format text. It should not be used for fields where the entry is selected from a list box.	Company Name 1 contains text Fidelio will select all profiles where Fidelio is contained anywhere in the name, e.g. both Micros Fidelio and Fidelio Software will be selected.
not contain text (Value is mandatory)	This operator is used to search fields where the entered value is not contained anywhere in the selected field.	Company Name 1 does not contain text Fidelio will select all profiles where Fidelio is not contained anywhere in the name, e.g. Micros Fidelio and Fidelio Software would not be selected.

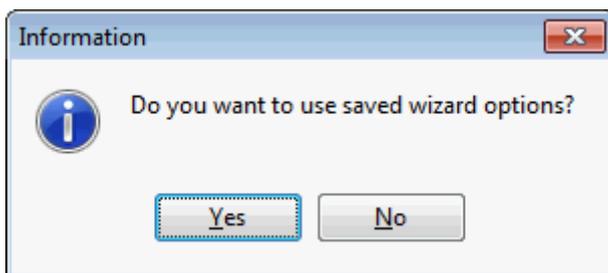
	This operator may be used for fields which contain free-format text. It should not be used for fields where the entry is selected from a list box.	
advanced date operator	This operator enables the user to search for a date value, year only, month only, day and month or day, month and year. On the fields Birthday and Wedding Day the option Anniversary is available and additional options are displayed to include or exclude in-house guests.	<p>Birthday advanced date operator month March will select all profiles where a birthday date has been entered for the month of March.</p> <p>Conference Booking advanced date operator year equals 2007 will select all profiles with a conference booking in 2007.</p> <p>On the field Birthday, activating the ANNIVERSARY check box, entering 50, 60 in the YEAR field and the required month in the MONTH field will select all profiles that have a 50th or 60th birthday in the specified month.</p>

Advanced Date Operator dialog box

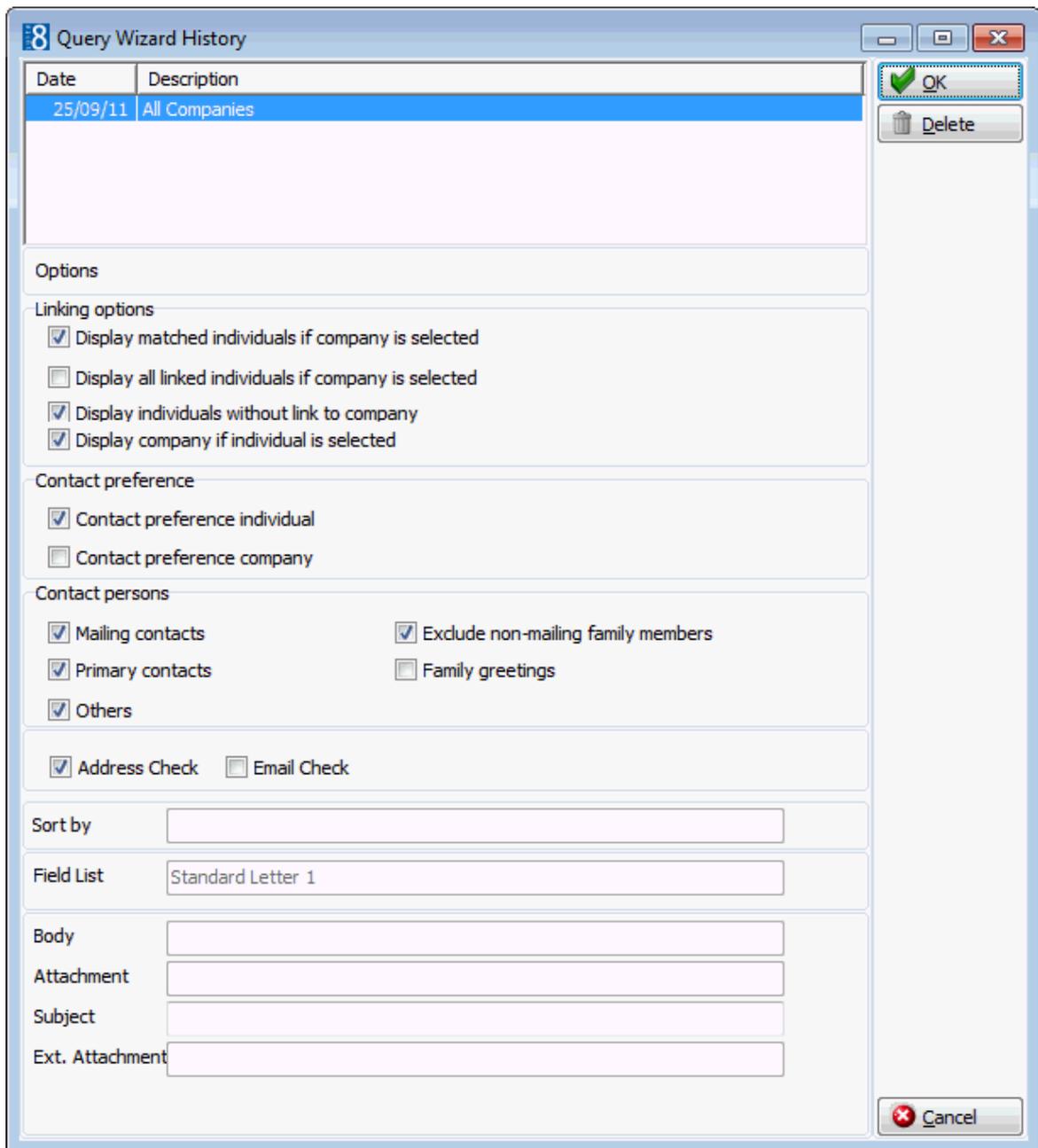
This Option	Defines
Anniversary	Enables the definition of one or multiple years instead of entering a specific year. This could be used for anniversaries such as 50th or 60th birthdays. Note: This option is only available for the Birthday and Wedding Day fields.
Year	Defines the year for the date value. Multiple years may be entered separated by a comma.
Month	Defines the month for the date value. Multiple months may be entered separated by a comma.
Day	Defines the day for the date value. Multiple days may be entered separated by a comma.
All	Includes all individuals regardless of whether they are in-house or not. Note: This option is only available for the Birthday and Wedding Day fields.
In-house	Includes in-house guests. Note: This option is only available for the Birthday and Wedding Day fields.
Not In-house	Excludes in-house guests. Note: This option is only available for the Birthday and Wedding Day fields.

Running a Standard or Advanced Mailing Query

1. From the Mailing dialog box, select either the STANDARD QUERY or ADVANCED QUERY tab.
2. Highlight the query to be run.
3. Click the SELECT button; if there are saved wizard settings then you are prompted to use the saved wizard options.

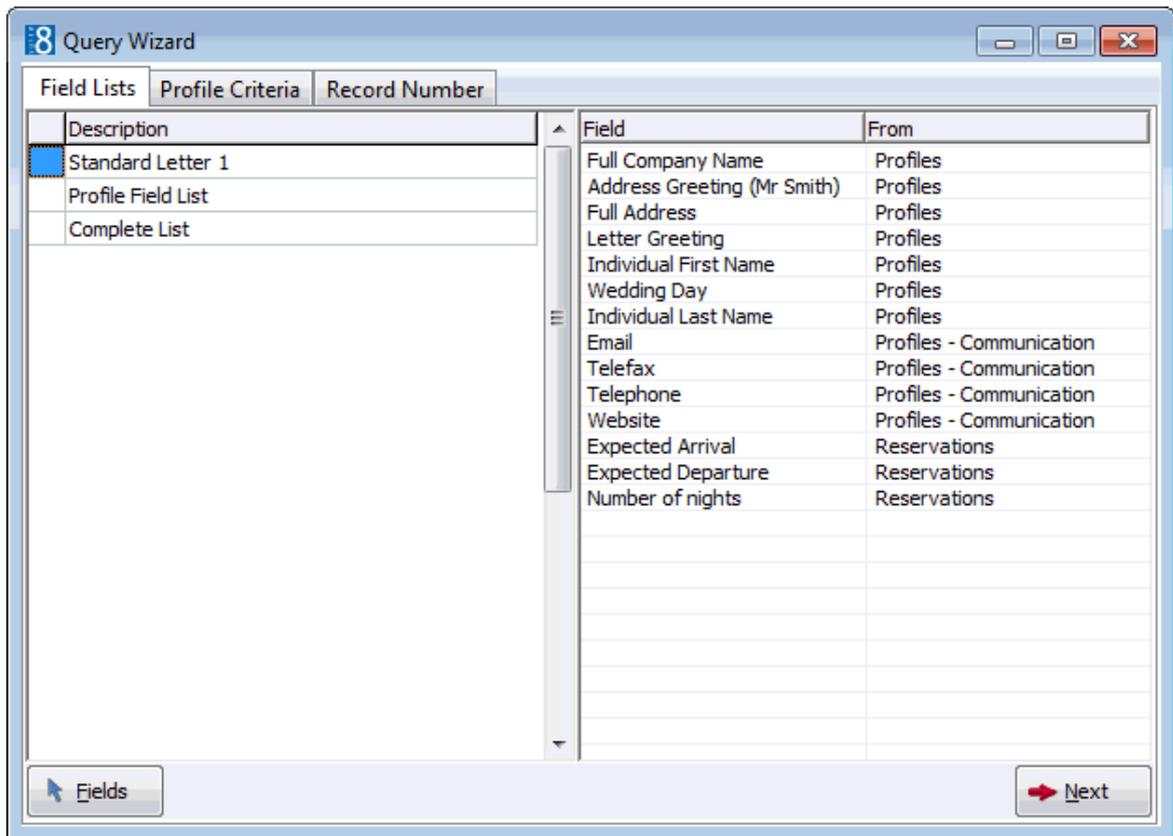


4. Click YES to view the saved wizard options or No to display a new query wizard dialog box.
5. If YES is selected then the Query Wizard History dialog box is displayed.

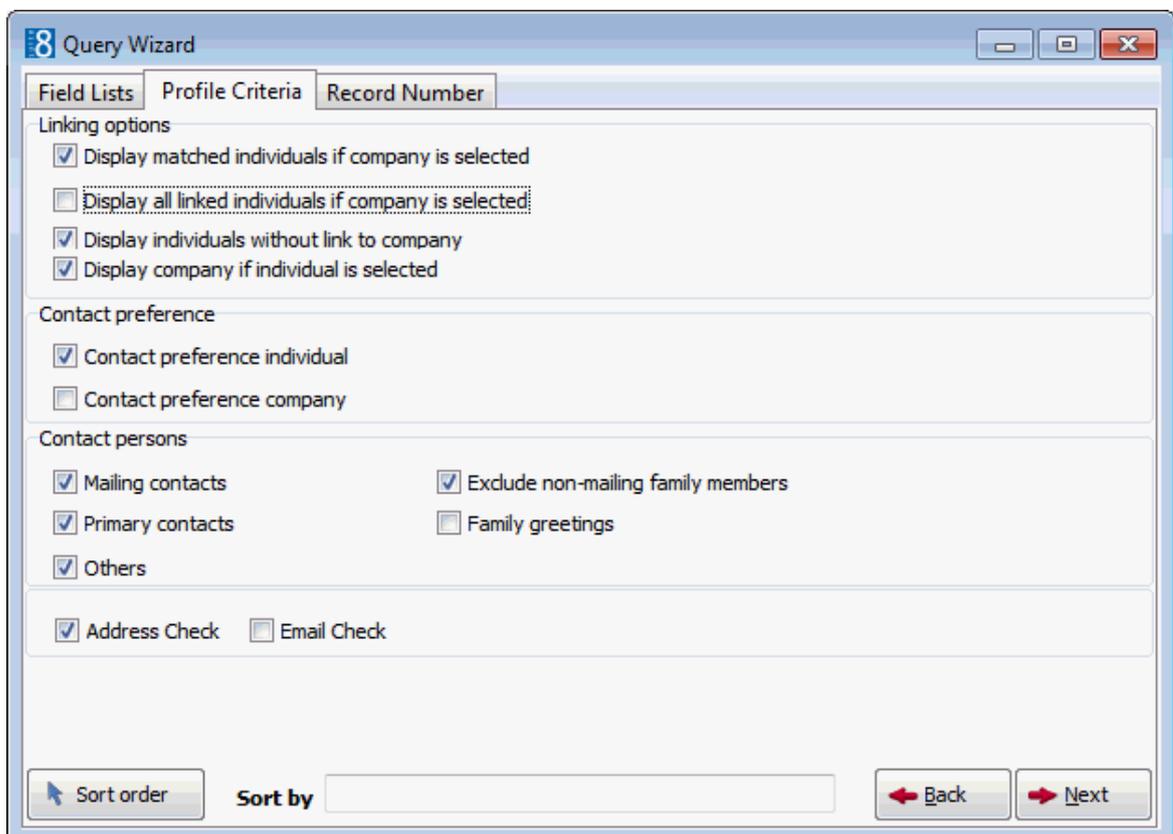


Note: Query Wizards which are no longer required may be deleted via the Query Wizard History dialog box by selecting the wizard and clicking the DELETE button.

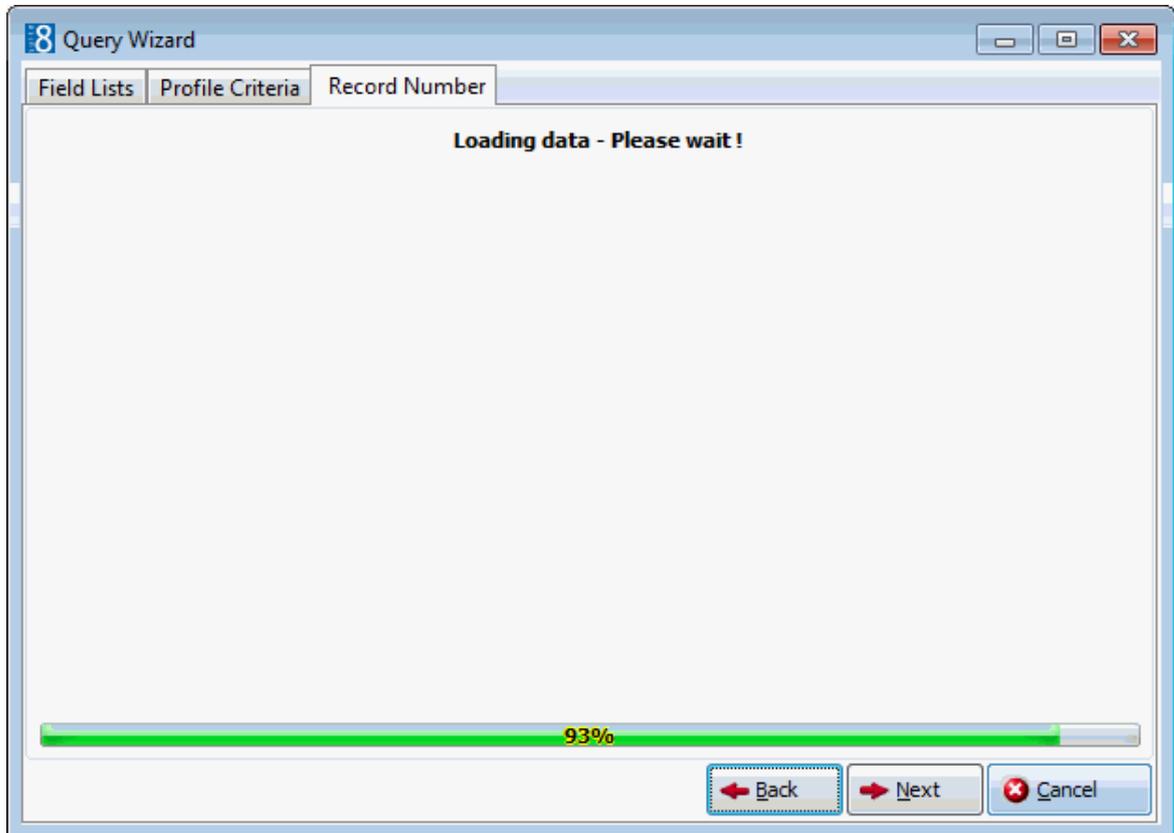
6. Select the query wizard required and click OK, the mailing results screen is displayed.
7. If No is selected then the Query wizard dialog box is displayed.
Any pre-defined field lists are displayed; these are the lists of fields that are used for the mailing query results.



8. Click the FIELDS button to edit an existing field list or build a new one, see CONFIGURATION → SETUP → MISCELLANEOUS → MAILING for more details.
9. Select a FIELD LIST and click NEXT to display the profile criteria dialog box. The first field list will be taken by default if no other field list is selected.

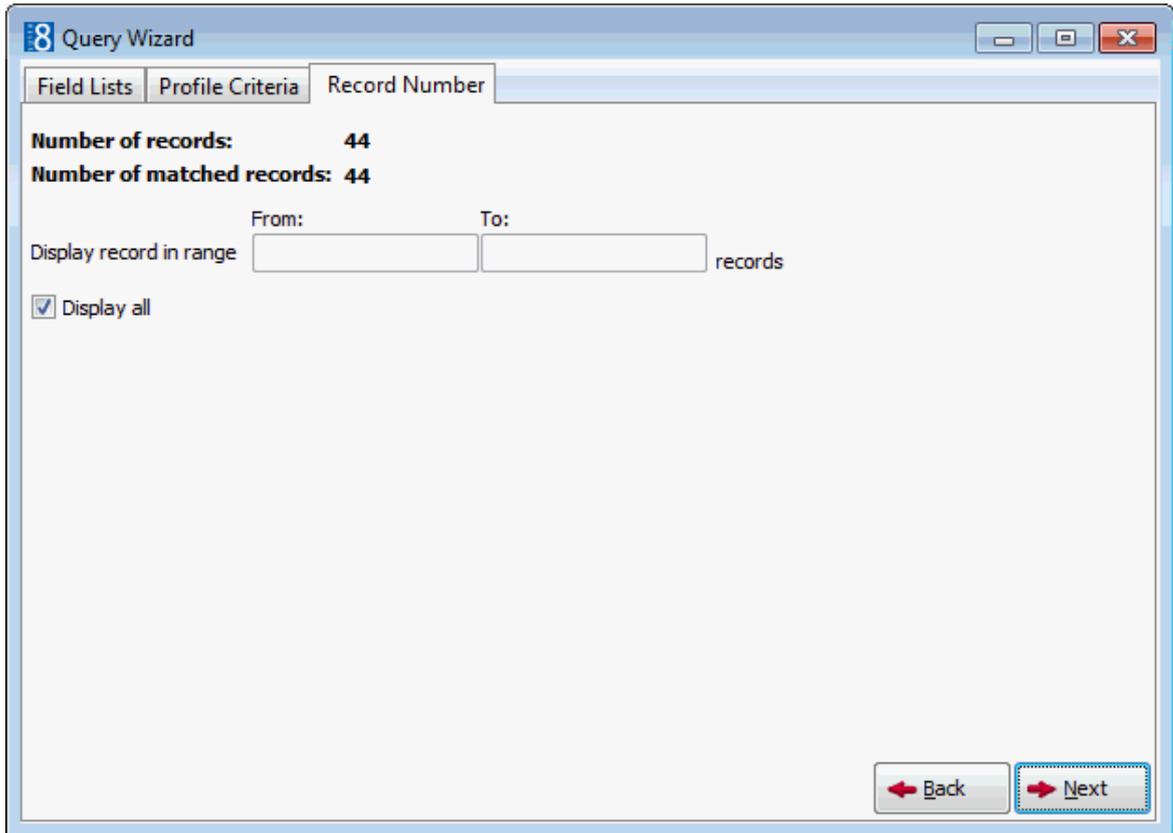


10. Mark the mailing option check boxes as required, the check boxes are explained in the table below.
11. Click NEXT, the query is run and a progress bar displays the status of the query, in addition the various stages of the query are displayed on top - Loading Data, Gathering Profiles, Validate Profiles and Links, Validate Family Members and Validate Address and Communications.

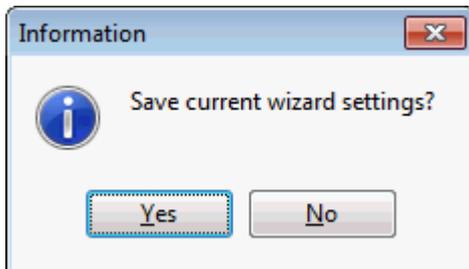


12. When the query finishes the query wizard displays the number of records found and the number of records matched.
 - Number of records shows all selected records.
 - Number of matched records shows the number of profiles that match the query.

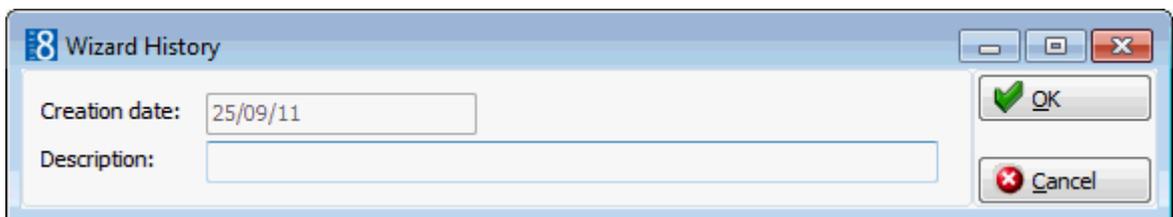
The number of records and the number of matched records could be different; for example, running a query for individuals with a certain action code, the mailing result will show both the number of individuals and the number of linked company profiles.



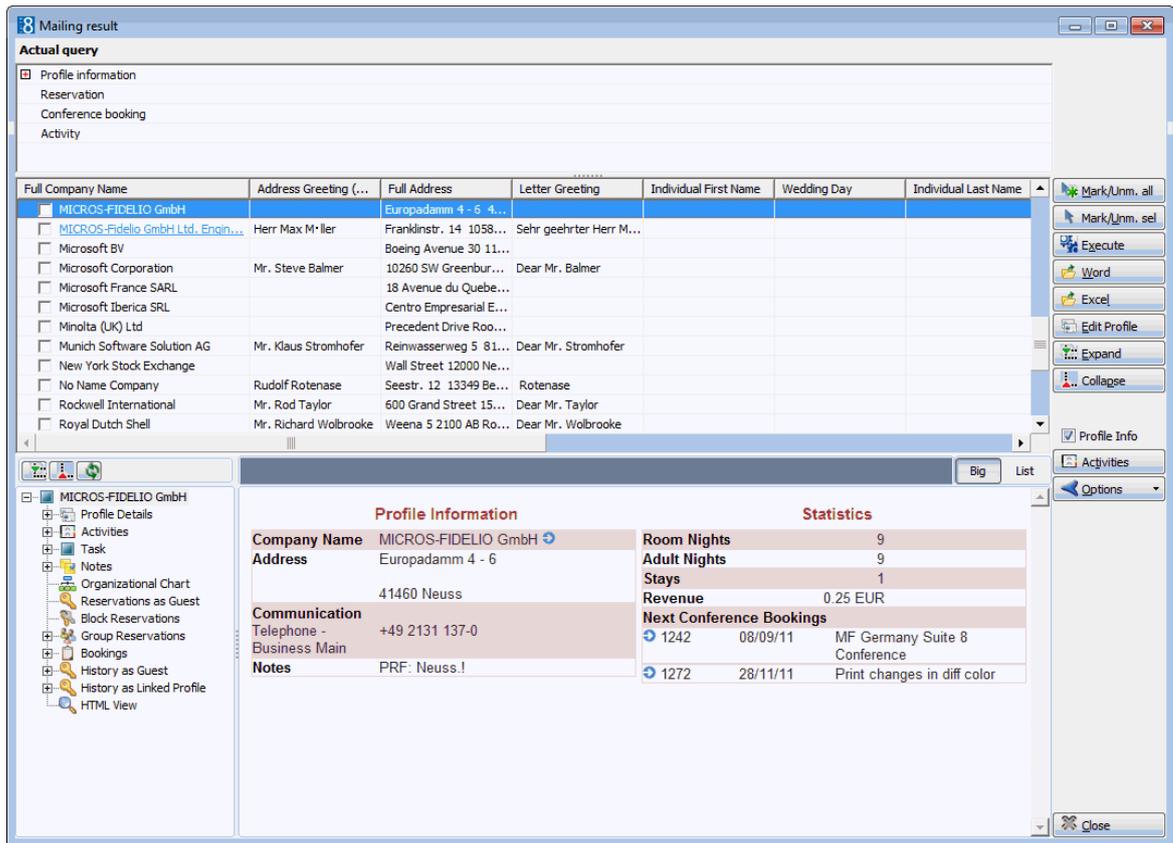
13. If a large number of records are found, a record range can be entered. To enter a range of records remove the check mark from the DISPLAY ALL checkbox field and complete the FROM and TO fields.
14. Click NEXT; you are prompted to 'Save current wizard settings?' Click YES to save the current wizard settings or No not to save the wizard settings.



15. If you selected to save the wizard settings then the Wizard History dialog box is displayed.



16. Enter a DESCRIPTION for the wizard settings; the CREATION DATE is completed automatically with the current date. The Wizard History saves only the settings, so that the next time a query is run from the Wizard History all current records matching the query will be displayed.
17. Click OK, the mailing result screen appears.



The upper window of the screen shows the options that were used in the query.

In the query results the values of the selected attribute categories will be displayed regardless if they have been used in the query or not, for example.

A guest has the following attributes defined:

Default Attributes			
Scope	INT	Newspapers	HT, NYT
Scope City		Specials	Extra Towel
Influence	NEG, DEC	Source	EMA
Product Interest	MET, INC, GOL, CON		
Mailing Codes	BDY, EST, XMS		
Action Codes	ANC		

The mailing query is setup to include the attribute code INFLUENCE equal to Decision Maker (DEC).

The field list includes the fields INFLUENCE, ACTION CODES and PRODUCT INTEREST.

In the mailing result the values of all three attribute categories are displayed in the result, however as the query included specifically the attribute value DECISION MAKER then this is displayed in brackets <DEC> indicating that it is part of the actual query.

Action Codes	Influence	Product Interest
BDY NEW WEK	<DEC>	CON GOL INC MET

- Records can be selected by selecting the check-box in front of the name or via the options MARK/UNM ALL or MARK/UNM SEL on the right hand side of the screen.

- The selected mailing result can be exported to Word or Excel or sent via email by clicking the relevant button.
- Profile details may be viewed and edited via the EDIT PROFILE button. The button is not accessible if more than one profile is marked. If a profile is edited and changed so that it no longer meets the query criteria then a warning will be displayed, however the profile remains in the mailing result list. The profile can either be de-selected or the mailing query run again.
- If the profile criteria 'Display all linked individuals if company is selected' was selected then the buttons EXPAND and COLLAPSE can be used to expand or to collapse all linked individuals of all companies. By default these are not expanded. Clicking the and signs next to the company name expands and collapses the linked individual of the selected company.
- The profile HTML and tree may be viewed via the PROFILE INFO button. The button is not accessible if more than one profile is marked.

Profile Criteria dialog box

Select this checkbox	To do this
Linking Options	
Display matched individuals if company is selected	If this option is selected individuals that are linked to a company and match the query will be shown in the result set.
Display all linked individuals if company is selected	If this option is selected individuals that are linked to a company will be shown in the result set. Example: If the query used was city=Hamburg and the company address is in Hamburg, but the address of the linked individual is not city=Hamburg, the linked individual will be shown as well.
Display individuals without link to company	If this option is selected individuals without a link to a company will be shown. Example: An individual without any company link with city=Hamburg will be displayed in the result set.
Display company if individual is selected	If this option is selected, the company that is linked to the individual will be displayed regardless of it meeting the query requirements. Example: Individual with city=Hamburg is linked to a company which has a city=Berlin. Due to the mailing query, the individual will be selected and if the option is selected the company will also be shown in the result set.
Contact Preference	
Contact Preference Individual	If this option is selected, the address entered on the individual level will be displayed in the result set.
Contact Preference Company	If this option is selected, the address entered on the company level will be displayed in the result set.
Contact Persons	
Mailing Contacts	If this option is selected all individuals defined as mailing contacts will be selected

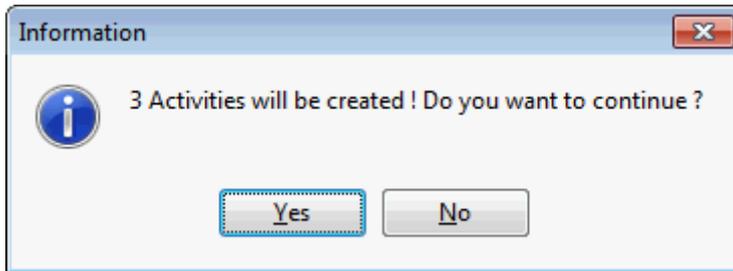
Primary Contacts	If this option is selected all individuals defined as primary contacts will be selected.
Other	If this option is selected all individuals other than mailing or primary will be selected
Exclude non-mailing family members	If this option is selected all family members which are not defined as family mailing contact will be excluded from the mailing. Note: This option is only available if the option 'Enable Family Wizard' is activated in Setup → Configuration → Global Settings → Profile Tab.
Family greetings	If this option is selected then the family address/letter greetings defined on the Family Wizard tab of the profile will be used in the mailing and not the individual address/letter greetings. Note: This option is only available if the option 'Enable Family Wizard' is activated in Setup → Configuration → Global Settings → Profile Tab.
Address Check	If this option is selected then only those profiles which match the query conditions and have an address (zip code and city) will be displayed in the query results.
Email Check	If this option is selected then only those profiles which match the query conditions and have an email address will be displayed in the query results.
Sort By	Users can define a sort order for each query by selecting it from the sort orders list, for example, users can define a sort order by country and then within the country by zip code and within the zip code in alphabetical order. Sort By <ol style="list-style-type: none"> 1. Click on the SORT ORDER button to display a list of defined sort criteria. 2. Choose the criteria required by selecting the checkboxes in the order required. 3. To change the sort order double-click on the column SORT ORDER and adjust the sort order number. 4. Right-click on the ORDER TYPE column to select whether the criteria should be sorted in ascending or descending order.

 The order of the fields that display the results is defined via the option LIST OF FIELDS under Configuration → Setup → Miscellaneous → Mailing.

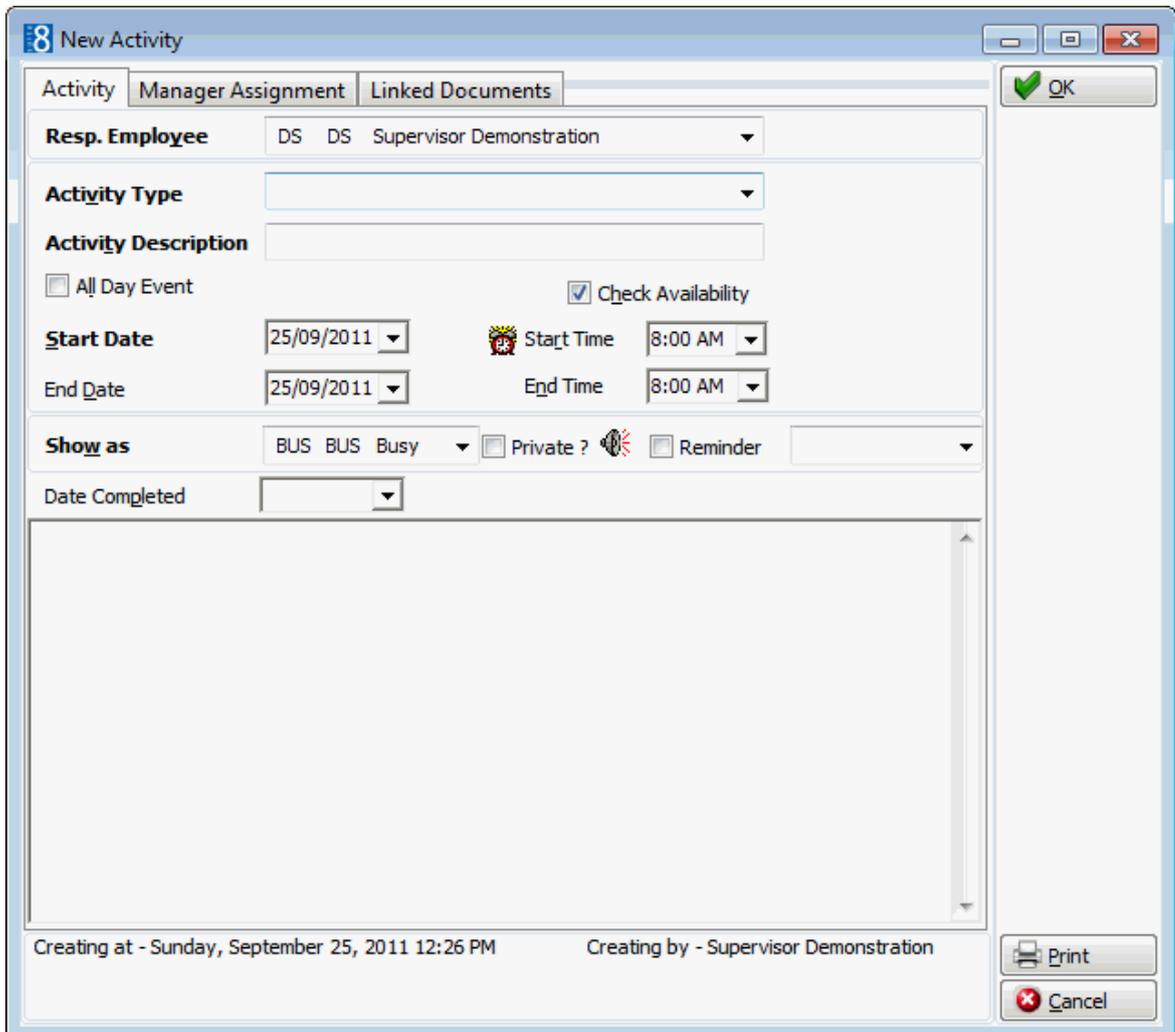
Creation of Activities

At the same time as running a mailing, activities can be created for those that were included in the mailing.

1. Run a mailing as detailed in 'Running a Standard or Advanced Mailing Query'.
2. Select the records for which activities are to be created.
3. On the mailing results screen select **ACTIVITIES**, a message is displayed indicating how many activities will be created.



4. Click YES; the New Activity dialog box is displayed.

A "New Activity" dialog box with a blue title bar and standard window controls. It has three tabs: "Activity", "Manager Assignment", and "Linked Documents". The "Activity" tab is active. Fields include: "Resp. Employee" (DS DS Supervisor Demonstration), "Activity Type" (dropdown), "Activity Description" (text area), "All Day Event" (checkbox), "Check Availability" (checked checkbox), "Start Date" (25/09/2011), "Start Time" (8:00 AM), "End Date" (25/09/2011), "End Time" (8:00 AM), "Show as" (BUS BUS Busy), "Private ?" (checkbox), "Reminder" (checkbox), and "Date Completed" (dropdown). At the bottom, it shows "Creating at - Sunday, September 25, 2011 12:26 PM" and "Creating by - Supervisor Demonstration". Buttons for "OK", "Print", and "Cancel" are on the right.

5. Complete the information as detailed in the table below.
6. Click OK to create the activities.

Tip: Make sure the field DATE COMPLETED is filled in otherwise many unfinished activities may be created.

7. Continue with the mailing merge, create for example a follow-up activity or click CLOSE on the mailing result screen.

Activity Edit dialog box

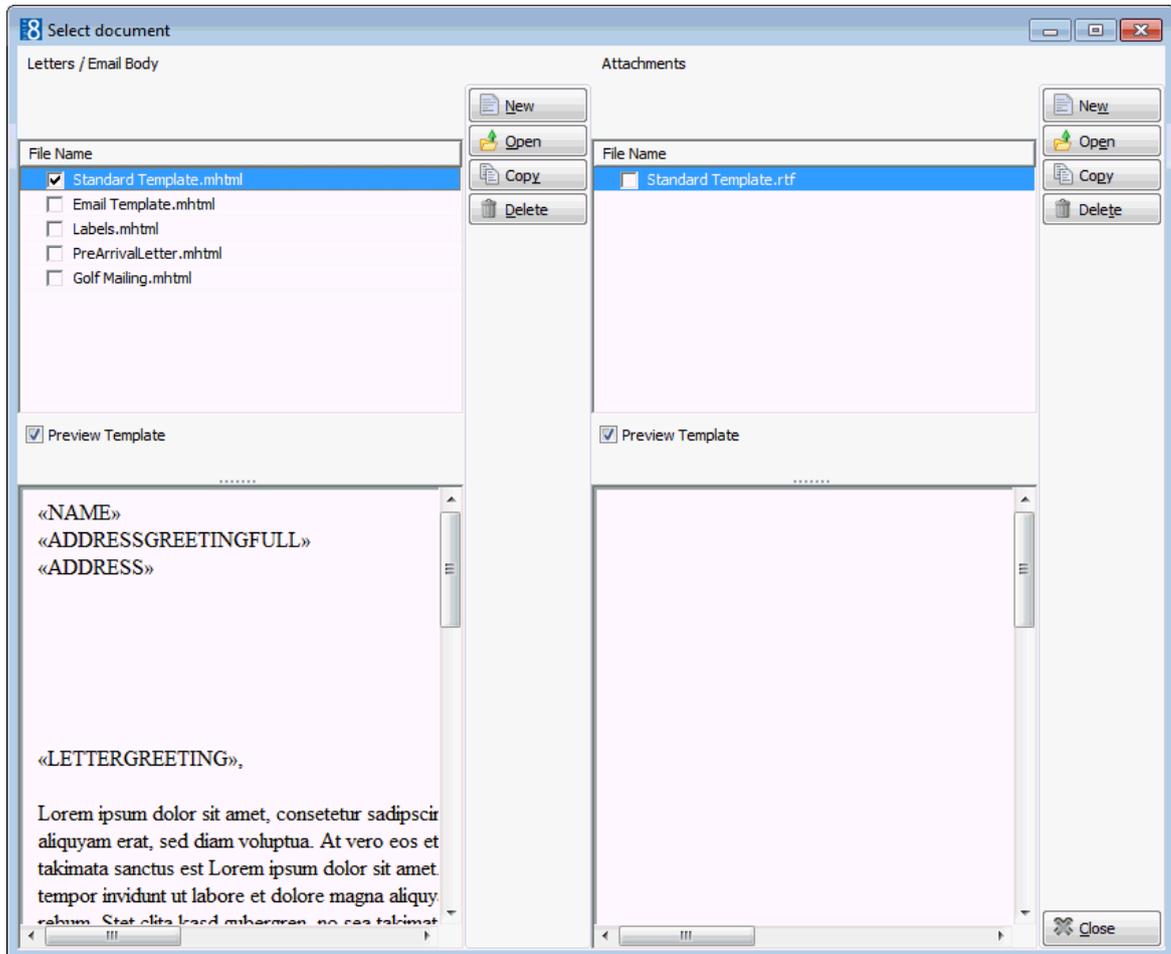
Fill in this field	With this information
Resp. Employee	Employee for whom this activity belongs.
Activity Type	Type of Activity.
Activity Description	Free format field to further define the purpose of the activity or to give a description of activity. By default the field is completed with the activity type as defined in the previous field.
All Day Event	Checking this field will mark the activity as an all day event. An activity marked as an all day event is displayed at the top of the column under the date field and not on the grid itself.
Check Availability	Select this checkbox to check availability when an activity is entered. If this option is active then each time an activity is entered for the resp. employee for that day and time, the availability message is displayed.
Start Date	The starting date of the activity.
Start Time	The starting time of the activity. The default starting time is defined in the Global Settings → Profile 1 tab.
End Date	The ending date of the activity.
End Time	The ending time of the activity. The default ending time is defined in the Global Settings → Profile 1 tab.
Show As	Selecting an entry from this list box shows whether the activity is taking place out of the office, if the Sales Manager is busy or free, etc.
Private	Checking this field will mark the activity as private. Note: Functionality not yet implemented.
Reminder	A reminder can be set, ranging from 5 minutes to one month. Users then have the option to choose to 'Dismiss' or 'Snooze' the activity. The reminder is sent to the responsible manager and any assigned managers.
Date Completed	Date the activity was completed - select from calendar.
	Free format field to add any additional notes or information. The day, date, time and name of the logged in user can be added to the text of the note by pressing F7.

Note: It is also possible to create activities for the future, for example, to make follow up calls. The field DATE COMPLETED should not be filled in this case.

Merging to Word

Selecting an existing document template:

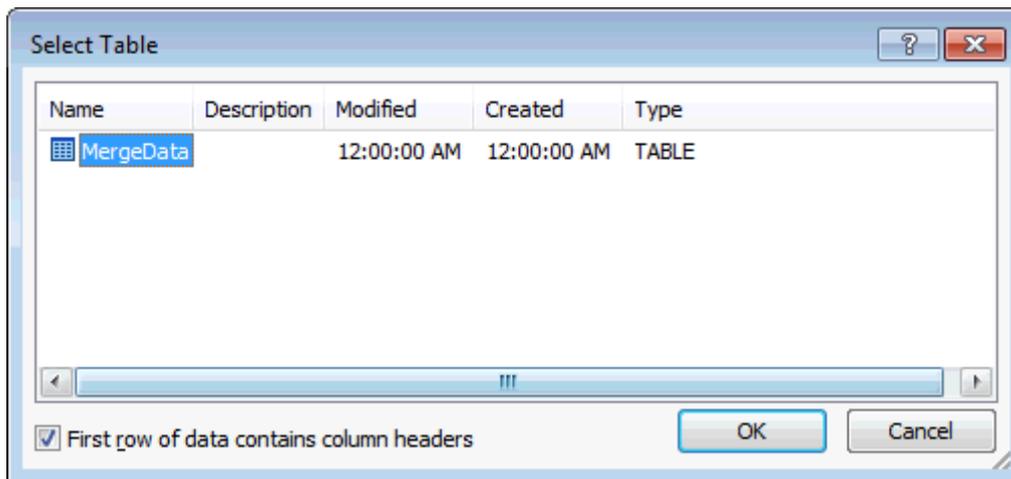
1. Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query'.
2. Mark the records to be included in the merge.
3. Click WORD, the Select document screen is displayed.



Note: When the information is exported to e.g. Word, the file `datasource.html` is created automatically; this file is required to perform the mail merge and is stored in the path defined under Setup → Configuration → Global Settings → Workstation Defaults tab → Local Log Directory. During the merge to Word Fidelio requires that the first record in the `datasource.html` file be empty, this record is suppressed by default and in Word the mailing merge records start at number 2.

4. Select the required document template.
5. As the PREVIEW check box is selected by default then the document template is displayed in the preview window. The header and footer are not displayed in preview mode.
6. Click OPEN, MS Word opens the letter with the merge fields and automatically displays the mail merge toolbar.

- If you are using Windows XP or Word2003 then the Select Table dialog box is displayed, click OK to close it.



- Select the  button to view the merged data, move from record to record via the arrows .

Note: The merged records start with record 2; record 1 is an empty record and is suppressed by default.

- Make any changes required to the letter and then click the FINISH & MERGE



icon, the merged results will then appear in a new document.

- Print the merged letters.
- To save the merged letters document click SAVE from the file menu in Word.
- Allocate a name and select a location to save the document.

Note: The following words and special characters may not be used in the file name when saving the document: CON, PRN, AUX, CLOCK\$, NULCOM0, COM1..9, LPT0..9 and special characters: |, \, ?, *, <, " , ; >, /

- Click CLOSE, the Suite8 Select documents screen is displayed and you are prompted to save the document in the database.
- Select No, as you do not want to save the merged letter file in the Suite8 database, MS Word is closed automatically.
- Click CLOSE to close the Select document screen.
- Click CLOSE to close the Mailing Results screen, the main mailing is screen is displayed.

Note: A dummy line is created in the datasource.html on top of the merge values passed to Microsoft. This is required due to Word interpreting the field zip code as a number if sorted by zip code and zip codes with letters were then displayed as 0. With this change zip codes are considered as a string value, the empty record is suppressed by default and the mailing record no. starts with 2 in Word.

Merging to Excel

1. Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query'.
2. Mark the records to be included in the merge.
3. Click EXCEL, MS Excel opens a worksheet showing the results of the merge. The columns listed are as defined in the selected field list.
4. To save the merged results click SAVE from the file menu in Excel.
5. Allocate a name and select a location to save the worksheet.
6. To close the worksheet, click CLOSE from the Excel file menu.
7. To close MS Excel click EXIT from the Excel file menu, the mailing results screen is displayed.

Creation of email mailings

Suite8 uses an internal mailing client, therefore all hotels, even if they do not have their own email system such as MS Outlook, will be able to use this feature.

To use this feature the following files are needed:

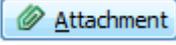
- IPWORKS5.DLL (needs to be in the same directory as the MFMAIL.DLL)
- MFMAIL.DLL
- RegisterEDlls.bat (that registers the MFMAIL.DLL)

Under Setup → Configuration → Global Settings → Generic tab, enter the email address of the property in the field HOTEL EMAIL. This email address will be used as the sender of emails.

There are 2 ways of sending an email mailing:

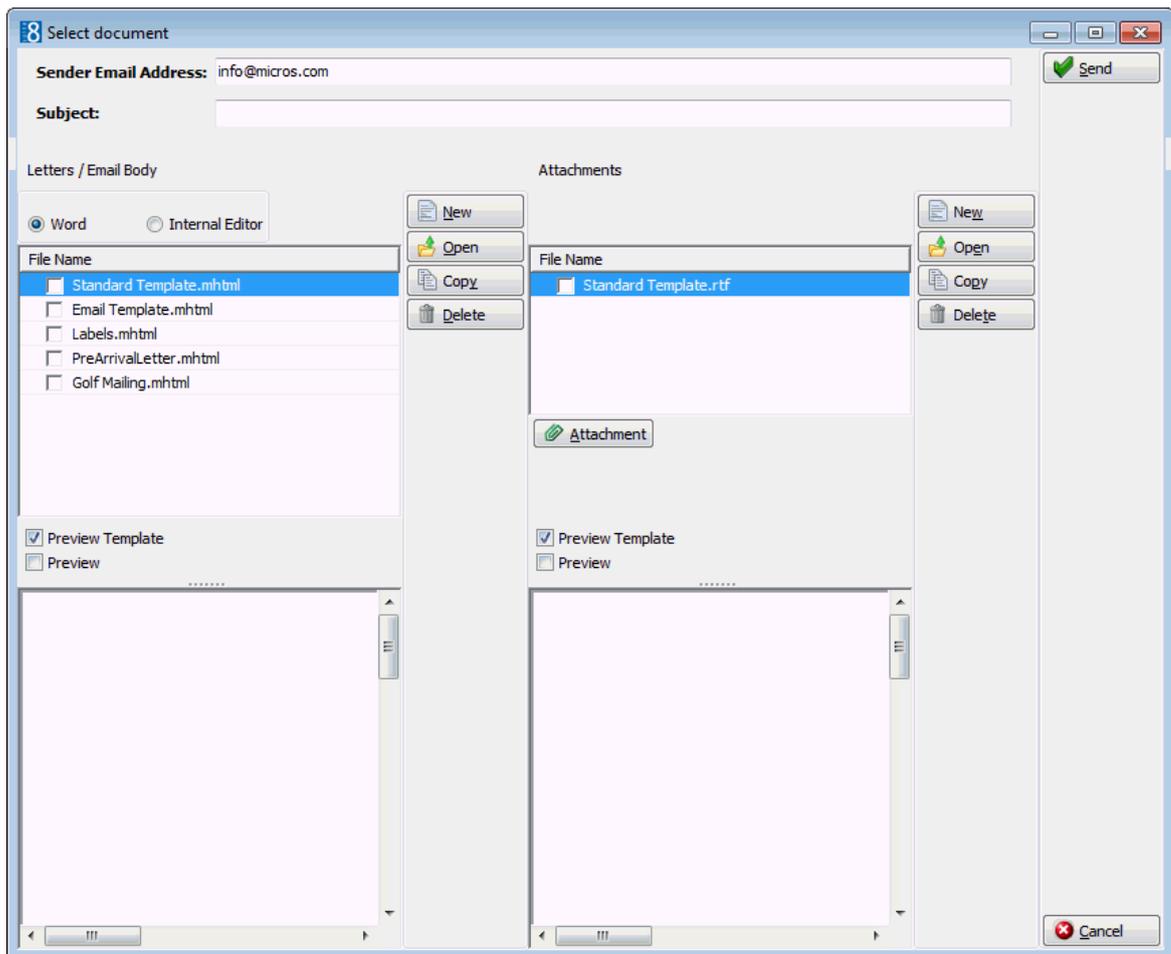
- As body text - the text is then displayed directly when the email is opened.
- As an attachment - attachments are sent as a PDF files. An email mailing sent as an attachment can also use merge functionality and will be merged according to the email address, for example, a letter greeting can be used and will be displayed correctly for each email.

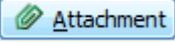
Documents can be attached to the body of the email as follows:

- Selecting the required file via the Attachment button  - any type of file can be attached and it will be sent as is.
- Selecting a document from the ATTACHMENTS column - these documents are sent as PDF files and can use merge functionality.

How to create an email mailing

1. Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query'.
2. Mark the records to be included in the merge.
3. Click the EMAIL button, the select document dialog box is displayed.



4. The sender's email address is taken from the global settings.
5. In the SUBJECT box enter the subject of the email.
6. Select the template to be used from the list displayed in the LETTERS / EMAIL BODY column or the ATTACHMENTS column.
The PREVIEW TEMPLATE check box is selected by default, so the selected template is automatically displayed in the lower window.
7. Select the PREVIEW check box to preview the merged results of the email. Click the left and right buttons   to page forwards and backwards through the merged records.
8. To attach a document to the body email there are two possibilities:
 - Selecting the required file via the Attachment button  - any type of file can be attached and it will be sent as is.
 - Selecting a document from the ATTACHMENTS column - these documents are sent as PDF files and can use merge functionality.
9. To remove an attachment right-click on the attachment name and select DELETE ATTACHMENT, to remove an attachment document just de-select it.
10. Click SEND to activate sending, an 'Are you sure' message is displayed, click YES to continue with the sending of the emails or No to cancel.

The message: 'Please wait while emails are being sent' will display. Depending on the number of emails being sent this can take some time.

The status of the emails can be checked under Miscellaneous → Logs → Email Log.

Note: The following Word Versions work with email mailings.

Word 2002, Word 2003 + XP: all released Features.

Word 2000: Picture & Logos are not getting sent.

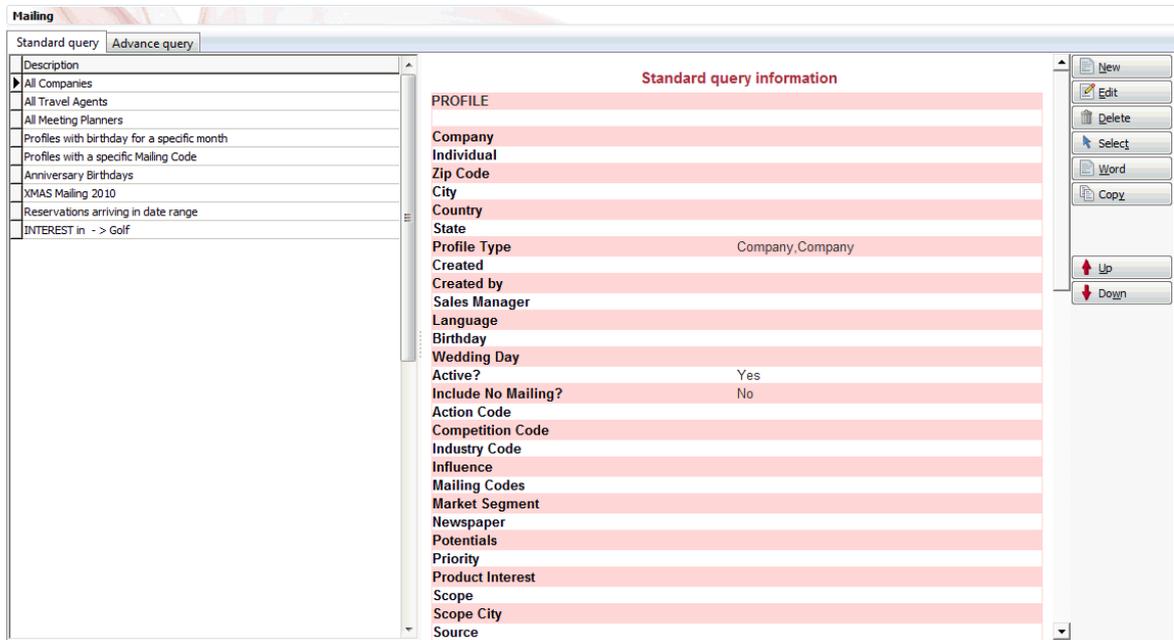
Creation of Documents and Attachments

Templates and attachment documents may be created and stored for future use. The easiest and quickest way to do this is from the main mailing screen. From here you can directly access the document and attachment options. The exception to this would be if you need additional fields in which case you would have to create the query accordingly and then access the document templates option from the mailing results screen.

A mailing query needs to be run at least once in order to create the file datasource.html. When the WORD button is pressed the data and field list from the last executed mailing are used. If the data of an actual mailing should be used then the required mailing query needs to be run.

Create a new Document

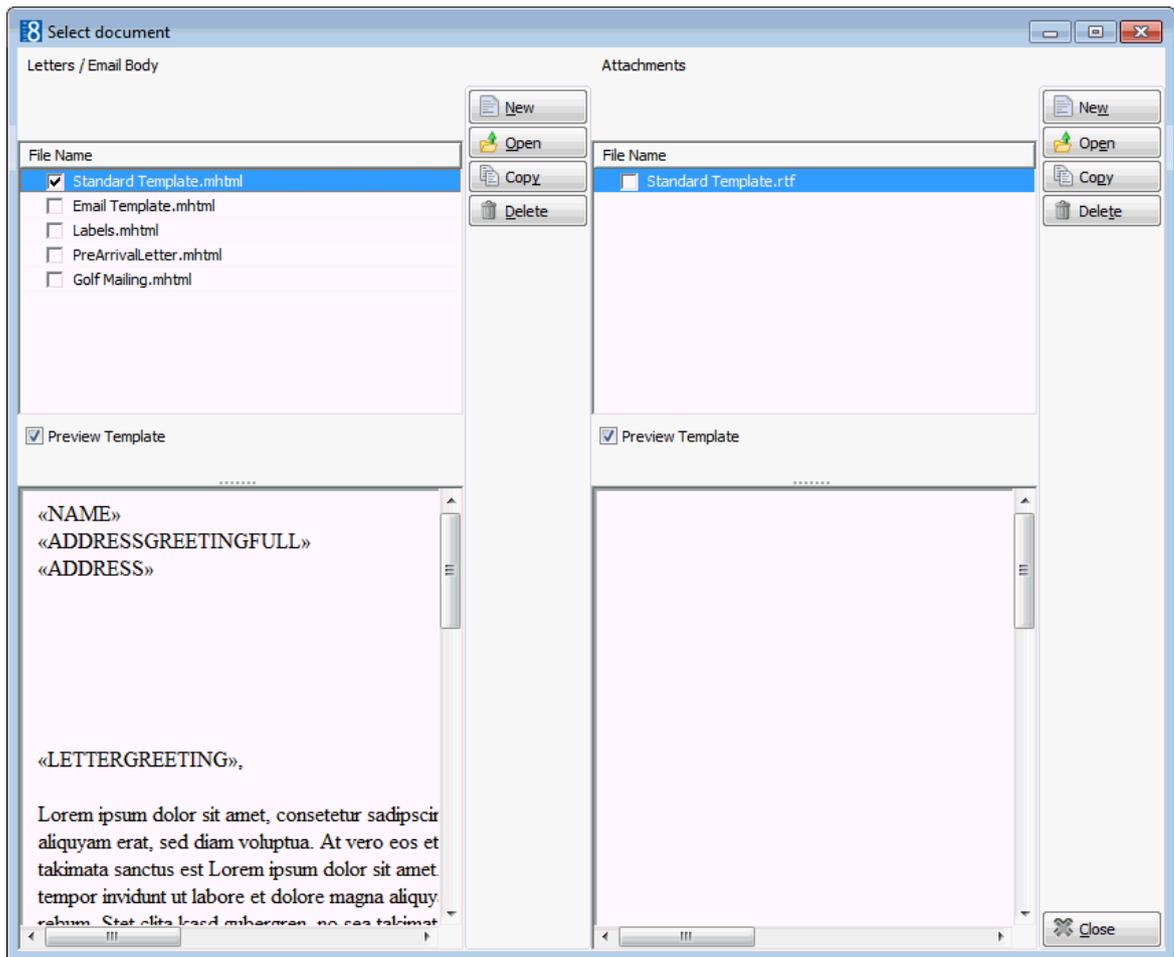
1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.



2. From the Mailing dialog box, click the WORD button, the Select document dialog box is displayed.

or

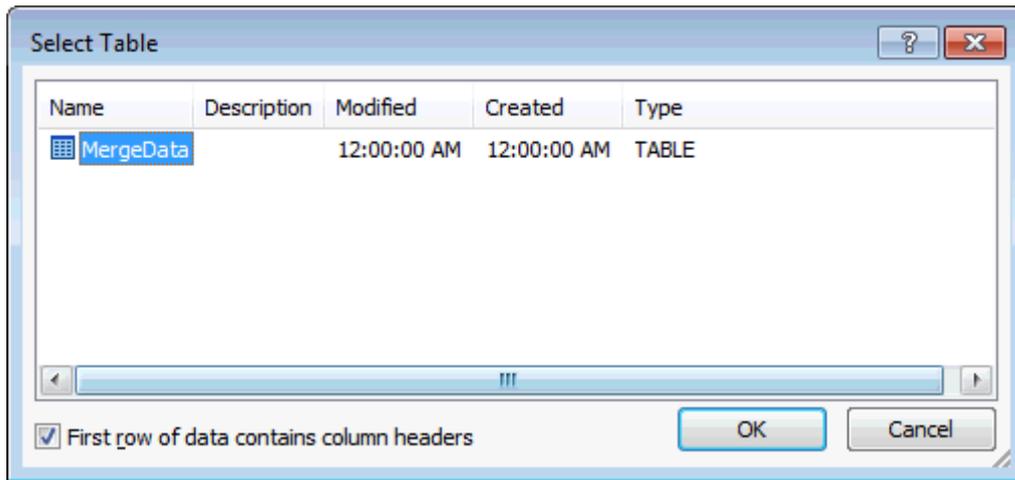
Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query' until the Mailing result screen is displayed and the profiles selected, then click the WORD button to display the Select document dialog box.



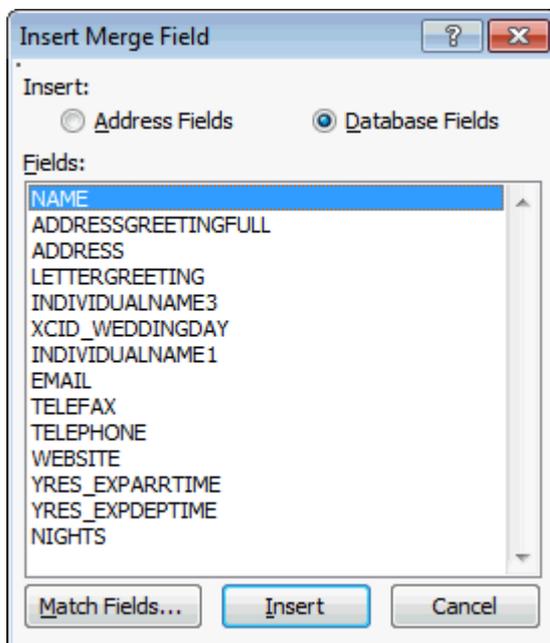
3. To create a new Letter/Email body document click NEW next to the LETTER / EMAIL BODY column, to create a new attachment click NEW, next to the ATTACHMENTS column, MS Word opens a blank word document.

Body documents are used for general letters and email mailings where the text should be displayed directly when the email is opened. Attachment document are used when the mailing is sent as a document attached to the email and not as text in the body of the email.

4. Depending on your Word settings the mail merge toolbar may be displayed automatically, if not, then on the Word View menu, point to TOOLBARS and then click CUSTOMIZE.
5. If you are using Windows XP or Word2003 then the Select Table dialog box is displayed, click OK to close it.



6. Select the INSERT MERGE FIELDS  button to display the Insert Merge Field dialog box.



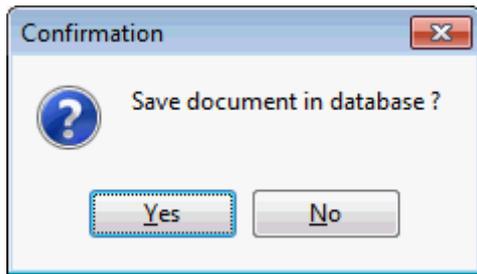
7. Select the merge field required and click INSERT, repeat for each field required and click CLOSE to close the dialog box.

8. Click the View Merged Data  button to check the output.

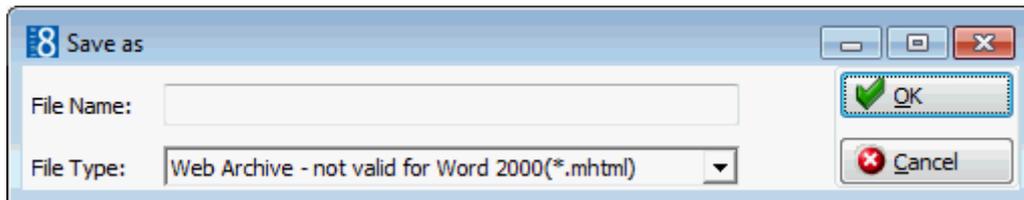
9. Click the View Merged Data  button a second time to display the merge fields again.

Note: The document should be saved when the merge fields are displayed and not when the merged data is displayed; otherwise the merge data will be displayed when viewing the template preview.

10. Complete the document and then click CLOSE or EXIT from the file menu. Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the document in the database.



11. Click YES and enter a file name.



At this point an Attachment document is saved as an rtf file and a Letter / Email Body document is saved as either an mhtml (Default) or an html file. The file is stored in the path defined in MAILING DOCUMENTS under Setup → Configuration → Global Settings → Workstation 5 tab. In addition for Body documents containing a header and or footer a directory containing a filelist.xml file and a header.html file are also created.

Note: The file type *.mhtml is not valid for Word 2000.

12. The new body or attachment document is now listed in the Select document screen.

13. To view the document template mark the PREVIEW check box.

14. Click CLOSE to close the Select document screen, the main mailing screen is displayed.

Note: If a document has been stored into the database and is deleted from the hard drive, it can be edited from within Suite8 and saved again.

There are 2 possibilities for saving a body template document

- HTML - is faster and is recommended for documents with no embedded image logos. Text can be formatted but logos, headers & footers cannot be used.
- MHTML - web archive document where the images are compressed in the document, logos, headers & footers can be used. The file type *.mhtml is not valid for Word 2000.

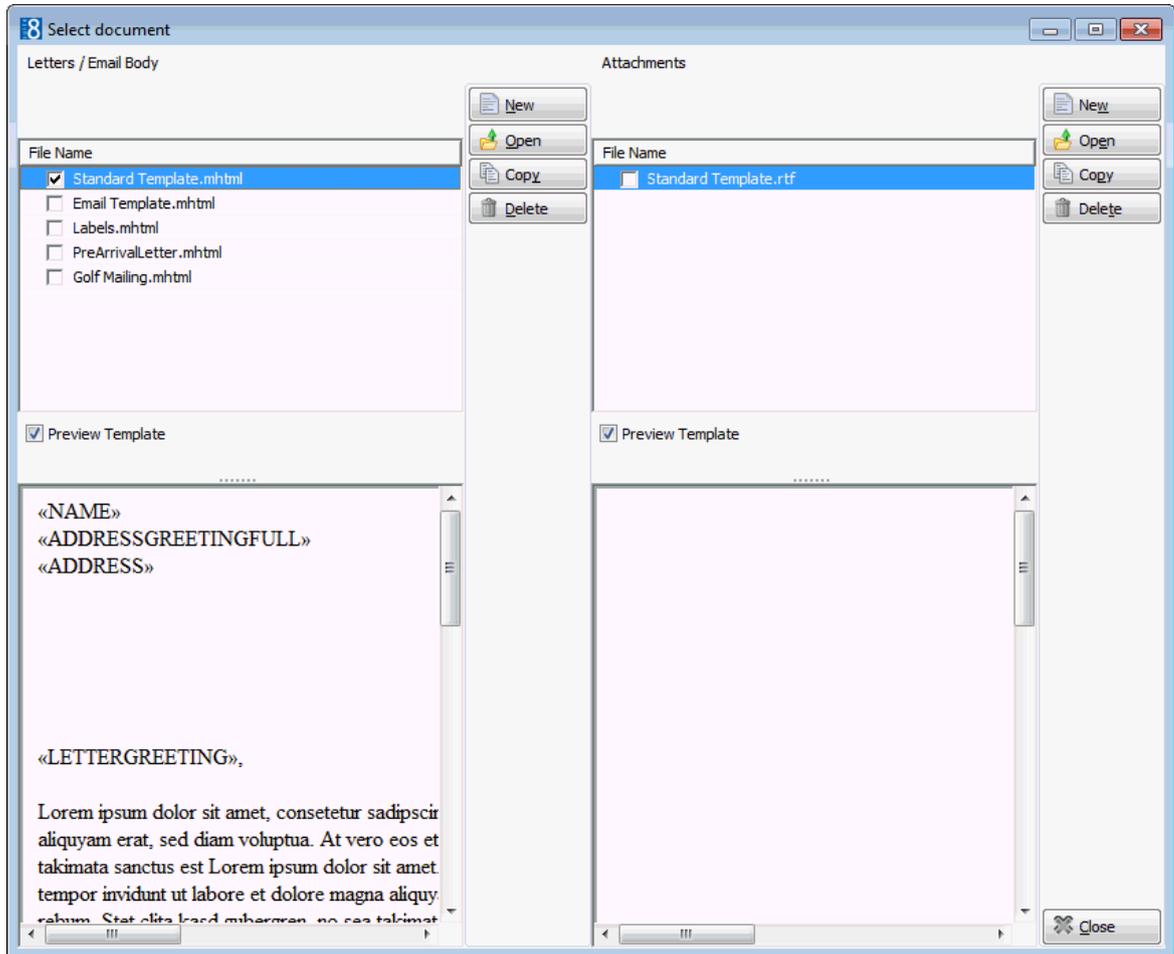
Note: It is not possible to save a document with a header/ footer as *.html - a warning will appear and word is opened again to save the document using the appropriate file extension.

Attachment documents can be saved as:

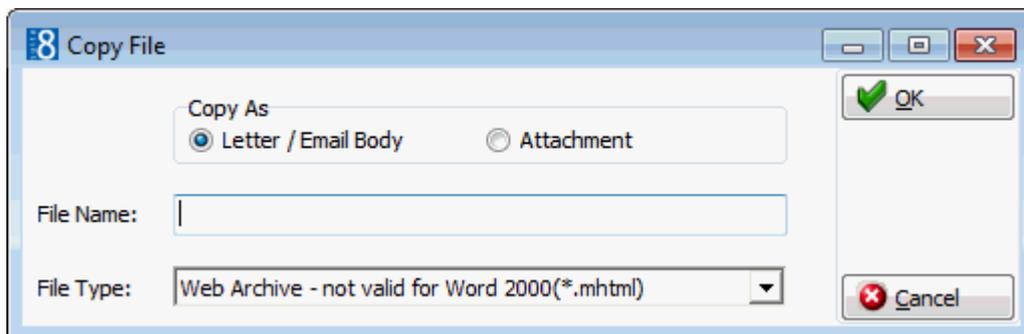
- RTF - which has the images encoded in the document, this is converted to *.PDF when sending emails. Attachment files that contain tables which have been drawn in tables are not displayed correctly when sent.

How to copy a Document

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the WORD button, the Select document dialog box is displayed.



3. Select the document to be copied from the list displayed in the LETTERS / EMAIL BODY or the ATTACHMENTS column.
4. Click COPY, the Copy Document dialog box is displayed.

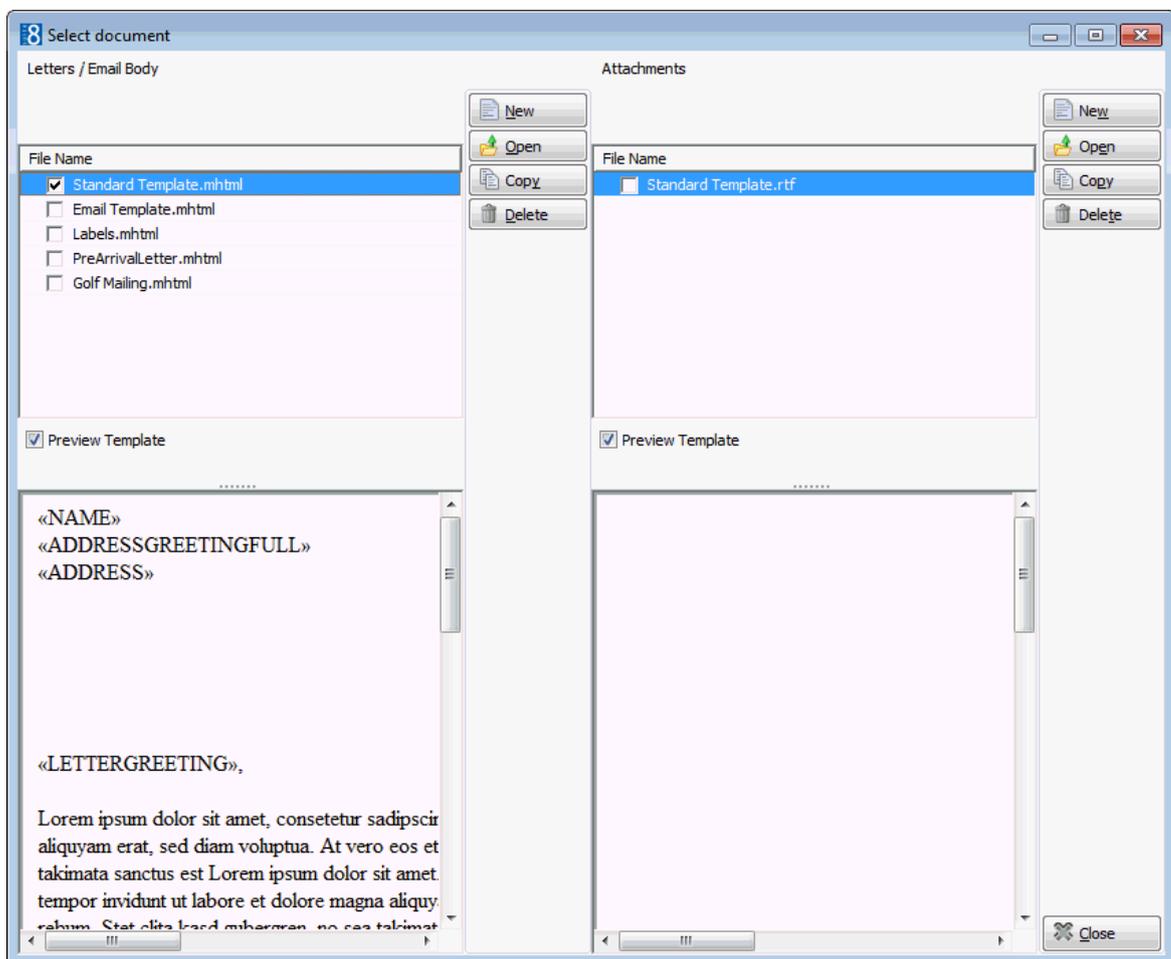


5. In the DOCUMENT NAME box enter a name for the copied document.
6. Select whether the new document should be copied as a LETTER / EMAIL BODY document or an ATTACHMENT.
7. Click OK, the copied document is displayed in the list of documents.
8. Click OPEN to edit the document.

9. If you are using Windows XP or Word2003 then the Select Table dialog box is displayed, click OK to close it.
10. Make the required changes to the copied document.
11. Click CLOSE, Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the document in the database.
12. Click YES and enter a file name.
13. The new body or attachment document is now listed in the Select document screen.
14. To view the document template mark the PREVIEW check box.
15. Click CLOSE to close the Select document screen, the main mailing screen is displayed.

How to edit a Document

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the WORD button, the Select document dialog box is displayed.

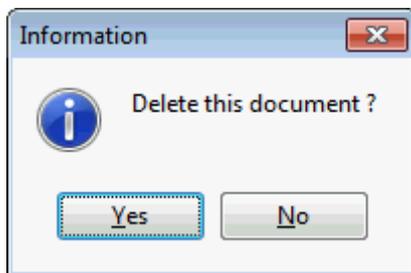


3. Select the document to be edited from the list displayed in the LETTERS / EMAIL BODY or the ATTACHMENTS column.
4. Click OPEN to edit the document.
5. If you are using Windows XP or Word2003 then the Select Table dialog box is displayed, click OK to close it.

6. Make the required changes to the document.
7. Click CLOSE, Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the document in the database.
8. Click YES and enter the same file name.
9. To view the document template mark the PREVIEW check box.
10. Click CLOSE to close the Select document screen, the main mailing screen is displayed.

How to delete a document

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the WORD button, the Select document dialog box is displayed.
3. Select the document to be deleted from the list displayed in the LETTERS / EMAIL BODY or the ATTACHMENTS column.
4. Click DELETE, a confirmation message is displayed.



5. Click YES to delete the document.

Note: The document is deleted from the Suite8 database but remains on the hard drive.

Letter Merge with a new or existing data file

Using MS Word, mailing letters can be produced using a merged data file that contains all the required information. Either an existing letter template or a new letter template may be used.

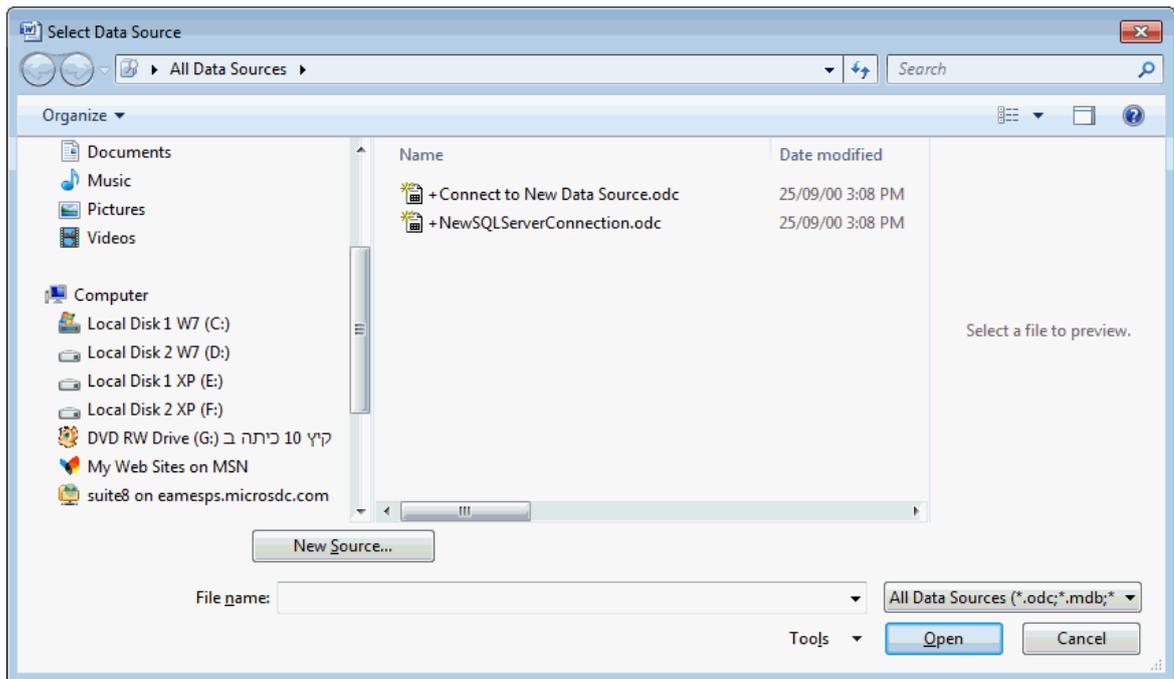
Merge a letter with a new or existing data file

1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the WORD button, the Select document dialog box is displayed.

or

Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query' until the Mailing result screen is displayed and then click the WORD button to display the Select document dialog box.

3. To create a new body document click NEW next to the LETTER / EMAIL BODY column, to create a new attachment click NEW, next to the ATTACHMENTS column, MS Word opens a blank word document.
4. In MS WORD open the letter that you want to use for the mailing.
5. On the mail merge toolbar click the SELECT RECIPIENTS  button and select USE EXISTING LIST to display the Select Data Source dialog box.

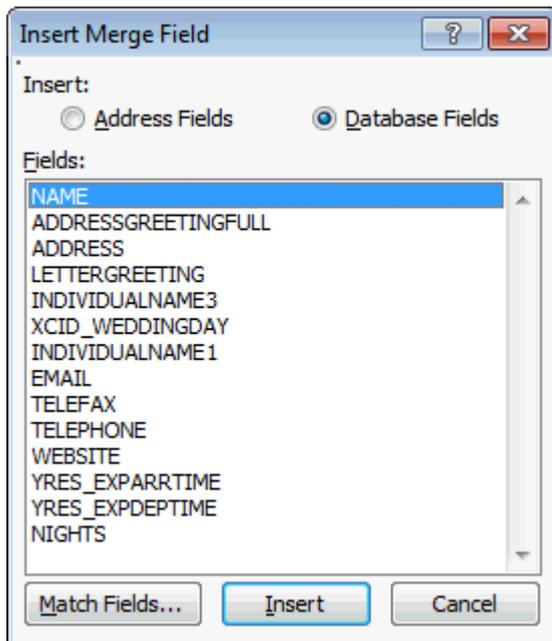


6. Locate the datasource.html file and click OPEN.

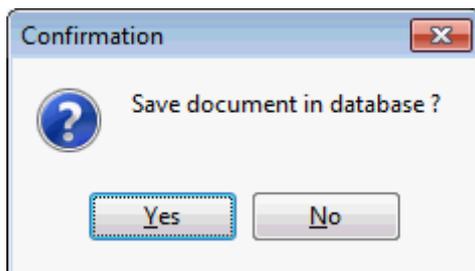
The datasource.html file is generated by Fidelio Suite8 when running a mailing query and is located in the directory defined in LOCAL LOG DIRECTORY under Setup → Configuration → Global Settings → Miscellaneous → Workstation Defaults 5 tab.

Note: The directory C:\Documents and Settings\My Documents\ My Data Sources is opened by default, requiring the users to search for the datasource.html each time. To avoid this, a shortcut to the datasource.html can be created in the directory 'My Data Sources'. Users can then select the shortcut to locate the datasource.html. This shortcut has to be created manually on each workstation where it's needed. If the path in global settings is changed then the shortcut has to be changed accordingly.

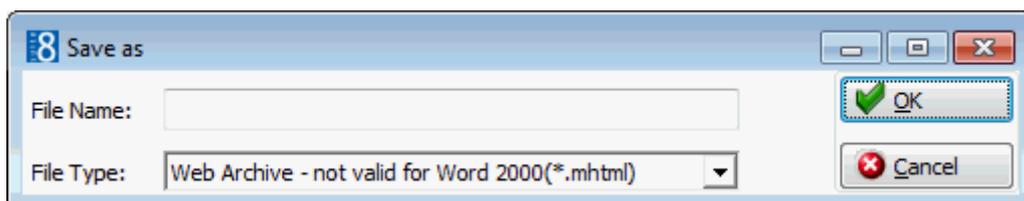
7. Select the INSERT MERGE FIELDS  button to display the Insert Merge Field dialog box.



8. Select the merge field required and click INSERT, repeat for each field required; click CLOSE to close the dialog box.
9. Complete the document and then either merge the data directly or click CLOSE or EXIT from the file menu. Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the document in the database.



10. Click YES and enter a file name.



At this point an Attachment document is saved as an rtf file and a Body document is saved as either an mhtml (Default) or an html file. The file is stored in the path defined in MAILING DOCUMENTS under Setup → Configuration → Global Settings → Workstation 5 tab. In addition for Body documents containing a header and or footer a directory containing a filelist.xml file and a header.html file are also created.

Note: The file type *.mhtml is not valid for Word 2000.

11. The new body or attachment document is now listed in the Select document screen.
12. To view the document template mark the PREVIEW check box.

13. Click CLOSE to close the Select document screen, the main mailing screen is displayed.

Create Envelopes and Labels using Windows XP or Word2003

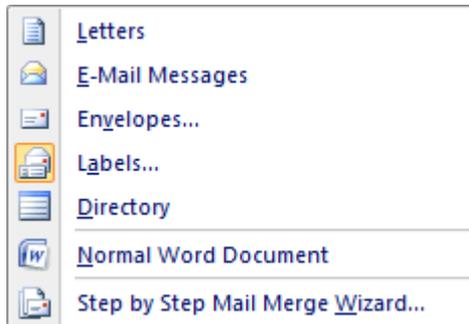
1. Click the menu option CRM and select MAILING, the mailing dialog box is displayed.
2. From the Mailing dialog box, click the WORD button, the Select document dialog box is displayed.

or

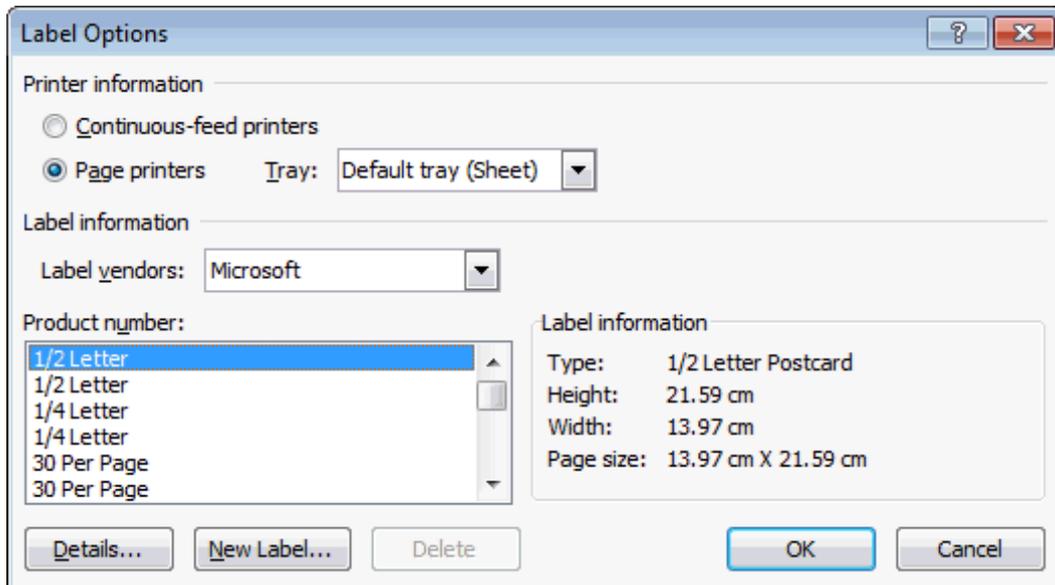
Follow the steps for running a mailing as detailed in 'Running a Standard or Advanced Mailing Query' until the Mailing result screen is displayed and then click the WORD button to display the Select document dialog box.

3. To create a new body document click NEW next to the LETTER / EMAIL BODY column, to create a new attachment click NEW, next to the ATTACHMENTS column, MS Word opens a blank word document.

4. On the mail merge toolbar select the START MAIL MERGE  button to display the Main Document Type dialog box.

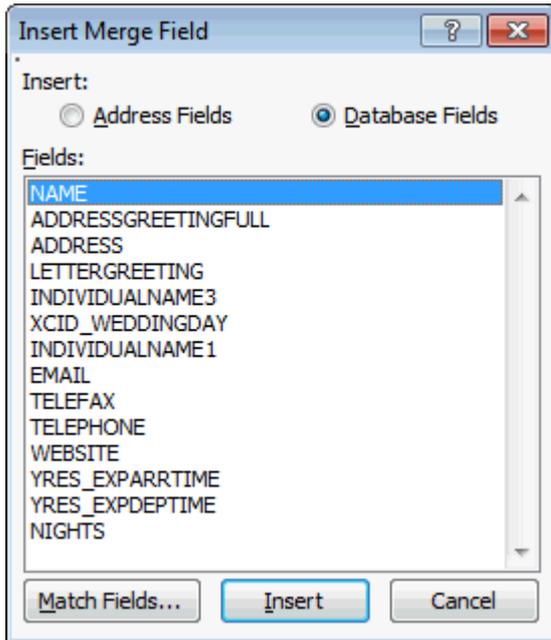


5. Select Labels and click OK, the Label Options dialog box is displayed.



6. Select the label type required and click OK, the label template screen is displayed.

7. Select the INSERT MERGE FIELDS  button to display the Insert Merge Field dialog box.



8. Select the merge field required and click INSERT, repeat for each field required and click CLOSE to close the dialog box.



9. Click the Update Labels  button, all the labels are updated with the merge fields.

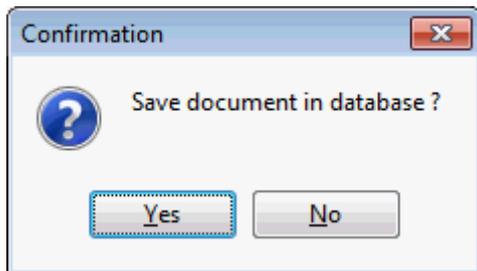


10. Click the View Merged Data  button to check the output.

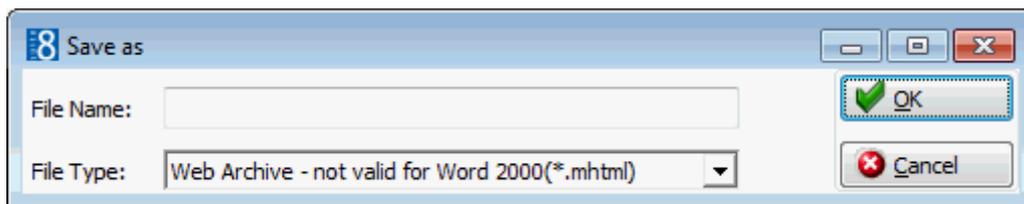
11. Click the View Merged Data  button a second time to display the merge fields again.

Note: The document should be saved when the merge fields are displayed and not when the merged data is displayed; otherwise the merge data will be displayed when viewing the template preview.

12. Click CLOSE or EXIT from the file menu. Word is closed, the Suite8 Select document screen is displayed and you are prompted to save the label template in the database.



13. Click YES and enter a file name.



14. The label template is now listed in the Select document screen.

15. Click CLOSE to close the Select document screen, the main mailing screen is displayed.

6 Easy Letter

With the easy letter option users can quickly and easily create letters based on pre-defined text blocks. Depending on where the Easy Letter option is accessed from, a guest profile and address can be selected and one or more text blocks placed in a desired sequence to quickly create a letter. The role allocated to the template determines under which easy letter option it appears.

- Templates defined as GENERAL DOCUMENTS are available from the CRM menu and from within both a profile and reservation.
- Templates defined as RESERVATION LETTER are available from within a reservation.
- Templates defined as PROFILE LETTER are available from the correspondence option of a guest profile.
- Templates defined as CONFERENCE LETTER are available from the print option of both a booking master and an event.
- Templates defined as TASKS & ACTIVITIES are available from the print option of a task or activity.

The easy letter option is accessible as follows:

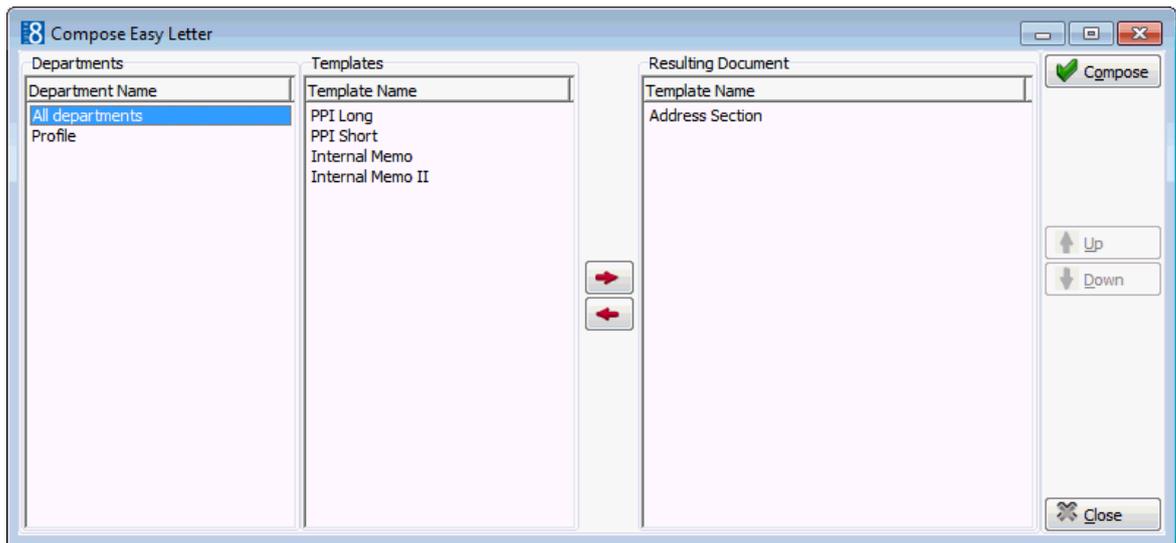
- On the CUSTOMER RELATION menu click EASY LETTER.
- On the CUSTOMER RELATION menu click PROFILES, select a profile, click Correspondence then click EASY LETTER.
- On the CUSTOMER RELATION menu click TASKS & ACTIVITIES, select a task or activity, click Print then click EASY LETTER.
- On the RESERVATIONS menu click UPDATE RESERVATIONS, select a reservation, click Confirmation Letter then click EASY LETTER.
- On the MEETING PLANNER menu click EVENT MANAGEMENT, select a booking master, click Print then click EASY LETTER.
- On the MEETING PLANNER menu click EVENT MANAGEMENT, select a booking master, click EVENTS, select an event, click Print then click EASY LETTER.

How to create an easy letter

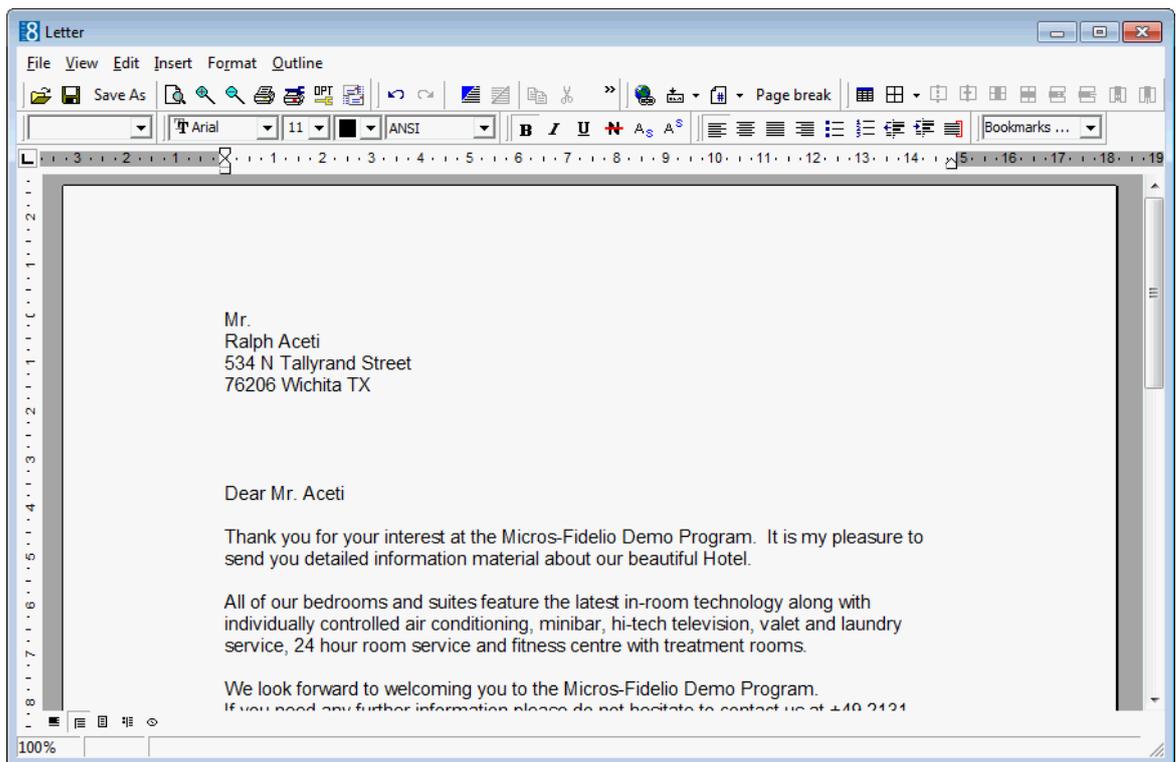
1. Access the Compose Easy Letter dialog box via one of the access methods described above.

The Compose Easy Letter screen is split into 3 sections:

- Departments - lists the available departments; ALL DEPARTMENTS lists all available templates.
- Templates - lists the available templates; templates are displayed according to the selected department.
- Resulting Document - lists the templates which are selected by default.



2. Select the required department from the DEPARTMENTS list; the templates belonging to the selected department are displayed in the TEMPLATES list.
3. Select the required template from the list of available TEMPLATES; click the arrow button to move the template to the RESULTING DOCUMENT window on the right.
4. Repeat step 3 for all the required templates. The order of the templates may be changed using the UP and DOWN arrows.
5. Click the COMPOSE button to display the Internal Editor screen.



6. Make any additions or changes to the letter as required.
7. To print the letter, click FILE then PRINT.
8. To email the letter click FILE then E-MAIL.
9. To save the letter click FILE then SAVE AS.
10. Allocate a FILE NAME, choose the location to save the letter and click SAVE.

The letter is saved in RTF format.

12. Click FILE then CLOSE to exit the Internal Editor.

Note: When composing an easy letter using multiple templates the page margins for the resulting letter are taken from the first template that is used in the Easy Letter composition.

 Easy letter templates are defined via the option EASY LETTER TEMPLATES under Setup → Configuration → Miscellaneous → Easy Letter.

7 Contract Handling

This option may be used to view, enter and edit contracts and is accessible via the option CONTRACT HANDLING on the Customer Relation menu and via the CONTRACT field on the Block Header.

Depending on the active licenses potential room nights, gross revenue, gross room revenue as well as expected conference revenue can be entered on the contract. Both the potential and the actual figures are displayed on the HTML, which can be printed via the right-click shortcut menu. The grid layout columns can be sorted by clicking on the column header.

How to create a new contract

1. Click the CUSTOMER RELATION menu and select CONTRACT HANDLING to display the Contract screen.
 - The upper part of the screen consists of multiple basic search criteria.
 - The middle part of the screen lists the contracts which meet the entered search criteria.
 - The lower part of the screen displays the contract details for the selected contract in HTML format.

Contract #	Contract name	Start date	End date	Roomnights	Gross Revenue	Gross Room Rev...	CCM Gross Reve...	Name	KCTH_ID
------------	---------------	------------	----------	------------	---------------	-------------------	-------------------	------	---------

2. Click NEW to display the Contract Definition dialog box.

3. The CONTRACT # is automatically assigned by the system, but may be changed as required.
4. Click the + PROFILE button to open the profile search screen.
5. Create a new profile or locate an existing profile and click SELECT.
Repeat steps 4 and 5 to add additional profiles to this contract.
6. Complete the remaining fields as detailed in the table below.
7. Click OK to save the contract definition.

Contract Definition dialog box

Fill in this field	With this information
Contract #	The contract number; this is automatically assigned by the system, but can be changed as required.
Profile	The profile or profiles linked to this contract, click the + PROFILE button to open the profile search.
Start Date	The starting date of the contract.
End Date	The end date of the contract.
Sign Up Date	The date the contract was signed.
Contract Name	The name assigned to the contract; this can be used in the search criteria.
Room Nights	The expected number of room nights.
Gross Rev	The expected gross revenue.

Gross Room Rev	The expected gross room revenue.
The following options are only displayed if the CCM licence is active.	
No of Events	The expected number of events
No of Attendees	The expected number of attendees.
CCM Gross Rev	The expected gross revenue for conference and catering.

Contract Search Criteria

Fill in this field	With this information
Contract Name	The name of the contract.
Contract #	The contract number.
From	The date the contract starts from.
To	The date the contract ends.
Profile Name	The name of the profile linked to the contract.
Include past contracts	Select this option to include historical contracts.

-  Contract handling is controlled by the parameter CONTRACT HANDLING under Setup → Configuration → Global Settings → Generic → Generic 3 tab.
-  Contract handling functionality is controlled by the user rights VIEW, INSERT, EDIT and DELETE under Setup → Configuration → Users → User Definition → Rights → Contracts.
-  Rooms contract details are controlled by the licence PMS under Setup → License → V8 Sublicences → Main sublicences.
-  Conference contract details are controlled by the licence CCM under Setup → License → V8 Sublicences → Main sublicences.

8 Opportunities

Opportunities

This option may be used to view, enter and edit Opportunities and is accessible via the option OPPORTUNITIES on the Customer Relation menu.

Opportunities display important details about the deals your sales teams are working on, such as how much each one is worth, who you are competing against and what stage the deal is at.

Suite8 offers a technical interface to synchronize contacts, profiles configuration and opportunities with Salesforce.

The screenshot displays the Suite8 Opportunities interface. At the top, there is a search filter with fields for Name, Stage, Close Date, Account Name, Type, Campaign, Delivery Status, and Owner. Below the filter is a table of opportunities with columns: Opportunity Name, Account Name, Stage, Type, Lead Source, Campaign, Delivery Status, Close Date, Amount, Probability %, Order #, Tracking #, and Last Modified. The table contains four rows of data. Below the table, the 'Opportunity Details' section shows information for the selected opportunity: Opportunity Name (MICROS_Fidelio Suite8 Workshop), Account (MICROS), Amount and Probability (14000 with 20%), Amount expected (280000), Close Date (05/09/11), and Stage (10 Needs Analysis). The 'Requisition Details' section includes a table for Rooms and a table for Function Spaces.

Opportunity Name	Account Name	Stage	Type	Lead Source	Campaign	Delivery Status	Close Date	Amount	Probability %	Order #	Tracking #	Last Modified
MICROS_Fidelio Suite8 Wor...	MICROS	Needs Analysis	New Customer	Phone Inquiry			05/09/11	14000	20			21/02/11
Table Reservation	Sonnenalp	Prospecting	Existing Cust...	Partner Refe...			16/09/11	15000	10			21/02/11
Siemens Wiesbaden Training	Siemens	Needs Analysis	New Customer	Word of mouth		Not yet started	27/10/11	60000	10			02/12/10
Suite8 Workshop	MICROS-Fidelio G...	Prospecting	Existing Cust...	External Ref...		Yet to begin	20/08/11	20000	80			01/12/10

Opportunity Details						
Opportunity Name	MICROS_Fidelio Suite8 Workshop					
Account	MICROS					
Amount and Probability	14000 with 20 %					
Amount expected	280000					
Close Date	05/09/11					
Stage	10 Needs Analysis					

Requisition Details						
Rooms	Room Type	From	To	Rooms	Persons	Notes
	Single Room	05/09/11	09/09/11	40	1	

Function Spaces						
Function Space	From	To	Number of FS	Persons	Notes	
Large Conference Room > 20 PAX	05/09/11 3:52:00 PM	09/09/11 3:52:00 PM	1	45		

How to create a new opportunity

1. Click the CUSTOMER RELATION menu and select OPPORTUNITIES to display the Opportunities screen.
 - The upper part of the screen consists of multiple basic search criteria.
 - The middle part of the screen lists the opportunities which meet the entered search criteria. The grid layout columns can be sorted by clicking on the column header.
 - The lower part of the screen displays the opportunity details for the selected opportunity in HTML format.

Opportunities

Name: Stage:

Close Date: to Campaign:

Account Name: Delivery Status:

Type: Owner:

Search
Reset Filter
New
Edit
Roll on Close Date

Opportunity Name	Account Name	Stage	Type	Lead Source	Campaign	Delivery Status	Close Date	Amount	Probability %	Order #	Tracking #	Last Modified
MICROS_Fidelio Suite8 Wor...	MICROS	Needs Analysis	New Customer	Phone Inquiry			05/09/11	14000	20			21/02/11
Table Reservation	Sonnenalp	Prospecting	Existing Cust...	Partner Refe...			16/09/11	15000	10			21/02/11
Siemens Wiesbaden Training	Siemens	Needs Analysis	New Customer	Word of mouth		Not yet started	27/10/11	60000	10			02/12/10
Suite8 Workshop	MICROS-Fidelio G...	Prospecting	Existing Cust...	External Ref...		Yet to begin	20/08/11	20000	80			01/12/10

Opportunity Details

Opportunity Name MICROS_Fidelio Suite8 Workshop

Account MICROS

Amount and Probability 14000 with 20 %

Amount expected 280000

Close Date 05/09/11

Stage 10 Needs Analysis

Requisition Details

Rooms	Room Type	From	To	Rooms	Persons	Notes
	Single Room	05/09/11	09/09/11	40	1	

Function Spaces	Function Space	From	To	Number of FS	Persons	Notes
	Large Conference Room > 20 PAX	05/09/11 3:52:00 PM	09/09/11 3:52:00 PM	1	45	

- Click NEW to display the Opportunity Definition dialog box.

8 Opportunity

Opportunity Name:

Account:

Type:

Lead Source:

Campaign:

Stage:

Delivery Status:

Owner:

Competitor:

Current Generator:

Next Step:

Description:

Private

Close Date: 07/09/2011

Quantity / Amount: 0 / 0

Order #:

Tracking #:

Probability (%): 0

OK

Cancel

- Complete the opportunity details as detailed in the table below.
- Click OK to save the Opportunity definition.

Opportunity Definition dialog box

Fill in this field	With this information
Opportunity Name	The name of the opportunity.
Account Profile	The profile linked to this opportunity; click the  button to open the profile search.
Type	Defines the type of opportunity, for example, existing customer - upgrade, new customer and existing customer - replacement.
Lead Source	Defines the lead source, for example, external referral, trade show, phone inquiry, purchased list and existing customer - replacement.
Campaign	Defines the type of campaign, such as yearly mailings or conference brochure update.
Stage	Defines the stage of the campaign, for example, prospecting, value proposition, proposal/price quote, negotiation/review and closed/won.
Delivery Status	Defines the current status of the campaign, for example, not yet started, in progress or completed.
Owner	Select the user name of the opportunity owner.
Competitor	Enter the name of any competitor.
Current Generator	
Next Step	Enter the next step which is planned for this opportunity.
Description	A detailed description of the opportunity can be entered.
Private	Defines if the opportunity is private.
Close Date	The date this opportunity is no longer relevant.
Quantity / Amount	The quantity of monetary value for this opportunity.
Order #	The order number.
Tracking #	The tracking number.
Probability (%)	The probability percentage to realize this opportunity.

Opportunity Search Criteria

Fill in this field	With this information
Name	The name of the opportunity.
Close Date	The closed date for the opportunity; a range of close dates can be entered.
Account Name	The name of the profile linked to the opportunity.
Type	Select the type of opportunity from the list box.
Stage	Select the opportunity stage from the list box.
Campaign	Select the campaign type from the list box.
Delivery Status	Select the opportunity delivery status from the list box.
Owner	The name of the user who owns the opportunity can be selected from a list box.

 Opportunities functionality is controlled by the parameter `ENABLE OPPORTUNITY FEATURE` under Setup → Configuration → Global Settings → Interfaces → Misc. Interface 5 tab.

-
-  Opportunity functionality requires the following items be defined: OPPORTUNITY CAMPAIGNS, OPPORTUNITY DELIVERY STATUS, OPPORTUNITY LEAD SOURCES, OPPORTUNITY STAGES and OPPORTUNITY TYPES.
 -  The default source code and event type are defined via the options SOURCE CODE and EVENT TYPE under Setup → Configuration → Global Settings → CCM → Conference 2 tab.
 -  Opportunities functionality is controlled by the user rights VIEW and VIEW PRIVATE OPPORTUNITIES under Setup → Configuration → Users → User Definition → Rights → Opportunities.

Note: Opportunities can be used without the Salesforce interface.

9 Bonus Point Cards

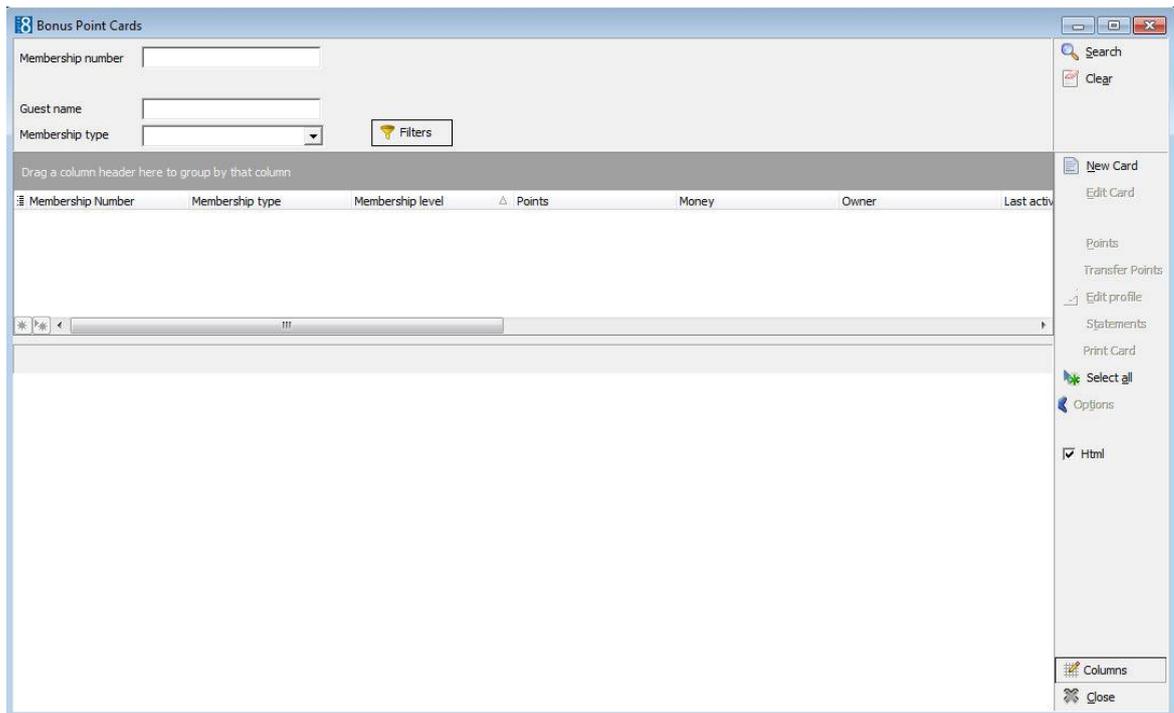
This option may be used to maintain and generate bonus point cards and is accessible via the option BONUS POINT CARDS on the Customer Relation menu and via GUEST CARD INFO on the Guest Profile.

Bonus Card Key Points

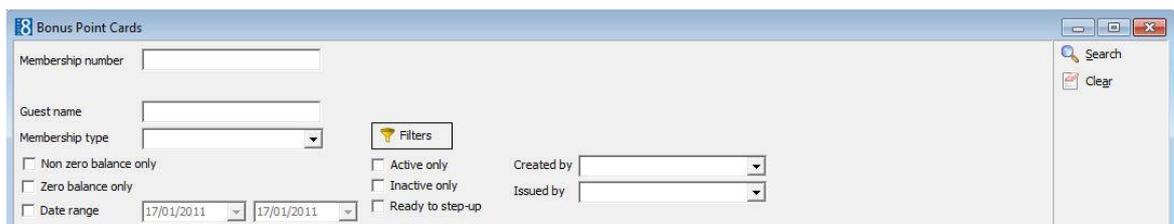
- Enrolment points are awarded immediately and are directly ready for consumption.
- Earned points are calculated and credited during the night audit after the guest has checked out.
- Product points can be added manually and may be awarded as compensation for a complaint or as an incentive, for example, when a guest introduces another member to the membership program.
- Product points may be used to 'purchase' products offered by the membership program.
- Points can be transferred from one membership card to another membership card.
- A bonus point statement can be printed or sent by email.
- An option to calculate points of all selected membership cards and verify if the number of points reaches the limit and allows stepping up to the next defined level.
- The grid layout columns can be sorted by clicking on the column header.
- Possibility to edit the guest profile or reservation directly from the bonus points card module.
- If the booker of the reservation has a bonus point card then the bonus points can be calculated for the booker's card even if there is no bonus card linked to the reservation. The bonus card indicator is displayed on the reservation and the bonus card information for the booker's card is displayed when double clicking on the indicator.

How to search for a card

1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS to display the Bonus Point Cards screen.
 - The upper part of the screen consists of multiple basic search criteria.
 - The middle part of the screen lists the membership levels which meet the entered search criteria.
 - If the HTML option is selected then the lower part of the screen displays the membership details for the selected guest in HTML format.



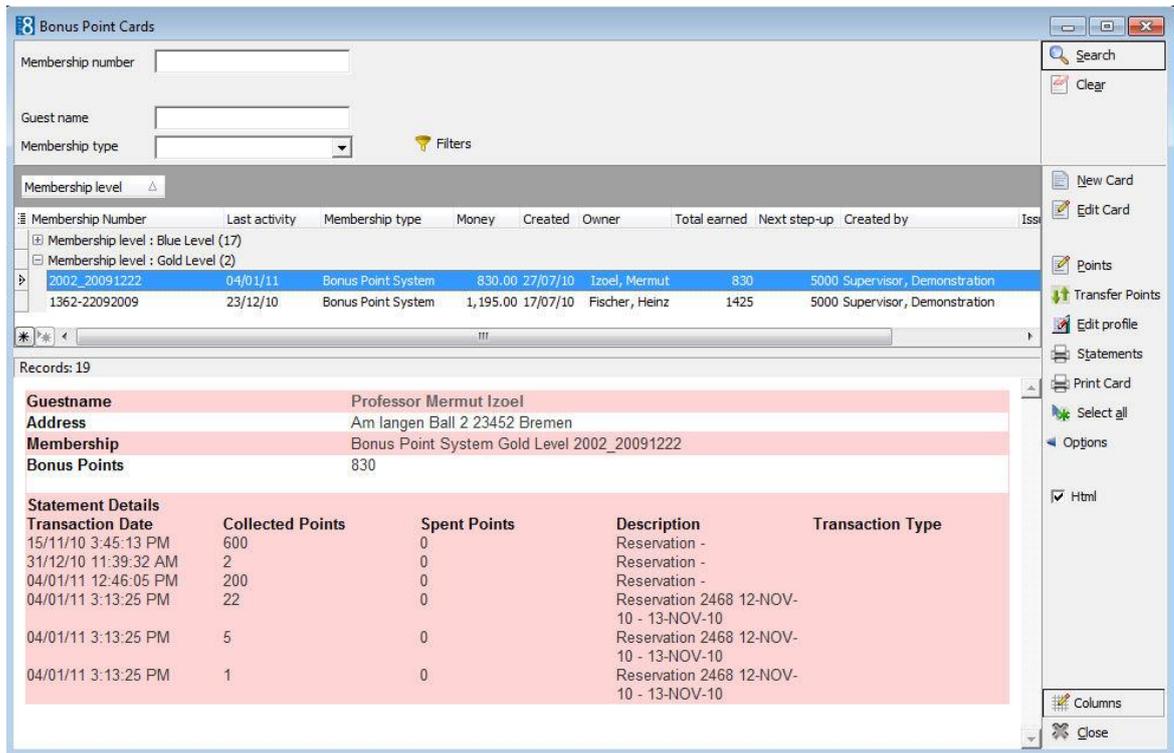
2. Click the FILTERS button to display additional search criteria.



3. Complete the search criteria and click SEARCH to display the membership cards which meet the entered criteria.
4. The results are displayed in grid format in the middle of the screen and in HTML format in the lower part of the screen. The HTML details displayed are of the record that the cursor is on in the grid.

How to create a new card

1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS to display the Bonus Point Cards screen.

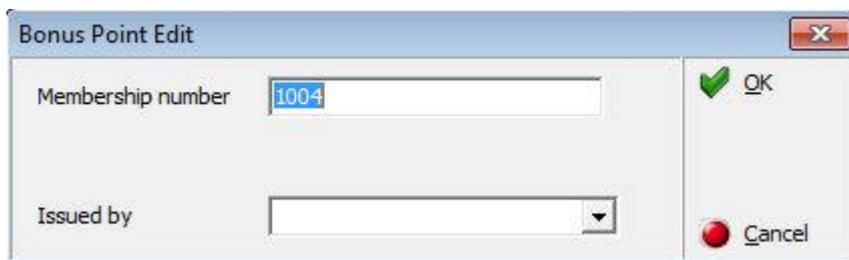


2. Click NEW CARD to display the Card Type dialog box.



3. Select the required card type and click OK.

The Bonus Point Edit dialog box is displayed



4. The MEMBERSHIP NUMBER is automatically assigned by the system.

5. ISSUED BY is optional but may be completed with the name of the person who 'sold' the membership bonus point card.

This is used by properties where employees are rewarded for membership card enrolments.

6. Click OK to save the membership number; the profile search screen is displayed.

7. Create a new profile or locate an existing profile and click SELECT.
8. Click OK to save the membership number.

Bonus Point Cards Search Criteria

Fill in this field	With this information
Membership number	The membership number.
Guest name	The name of the guest.
Membership type	Select the membership type to be displayed.
Non zero balance only	Select this option to display membership cards that do not have a zero balance.
Zero balance only	Select this option to display membership cards that have a zero balance.
Date range	Enter the from and to dates.
Active only	Select this option to display only active membership cards.
Inactive only	Select this option to display only inactive membership cards.
Ready to step-up	Select this option to display membership cards which have enough point to step up to the next level.
Created by	Select the name of the person who created the membership card.
Issued by	Select the name of the person who issued the membership card.

Options available on the bonus points screen

- NEW - used to enter a new membership card
- EDIT - used to edit a membership card
- POINTS - used to add or redeem bonus points
- TRANSFER POINTS - used to transfer points from one membership card to another
- EDIT PROFILE - used to view and/or edit the guest profile
- STATEMENTS - used to print or email bonus point statements
- PRINT CARD - used to print a membership card
- SELECT ALL - used to select all the membership cards listed
- OPTIONS
 - STEP UP MEMBERSHIP LEVEL -
 - FORCE STEP MEMBERSHIP LEVEL - this option forces the step up to the next defined level of the selected membership cards even if the limit is not reached yet.
 - SET MEMBERSHIP LEVEL MANUALLY - used to manually set a membership level on the selected membership cards.
 - DEACTIVATE MEMBERSHIP - used to deactivate a membership; a reason for the deactivation has to be entered.
 - LOG - used to display the user log for a specific membership card.
- HTML - select this option to display the membership details for the selected guest in HTML format.

- COLUMNS - select this option to remove all customization and display all columns available in the grid.

How to add points

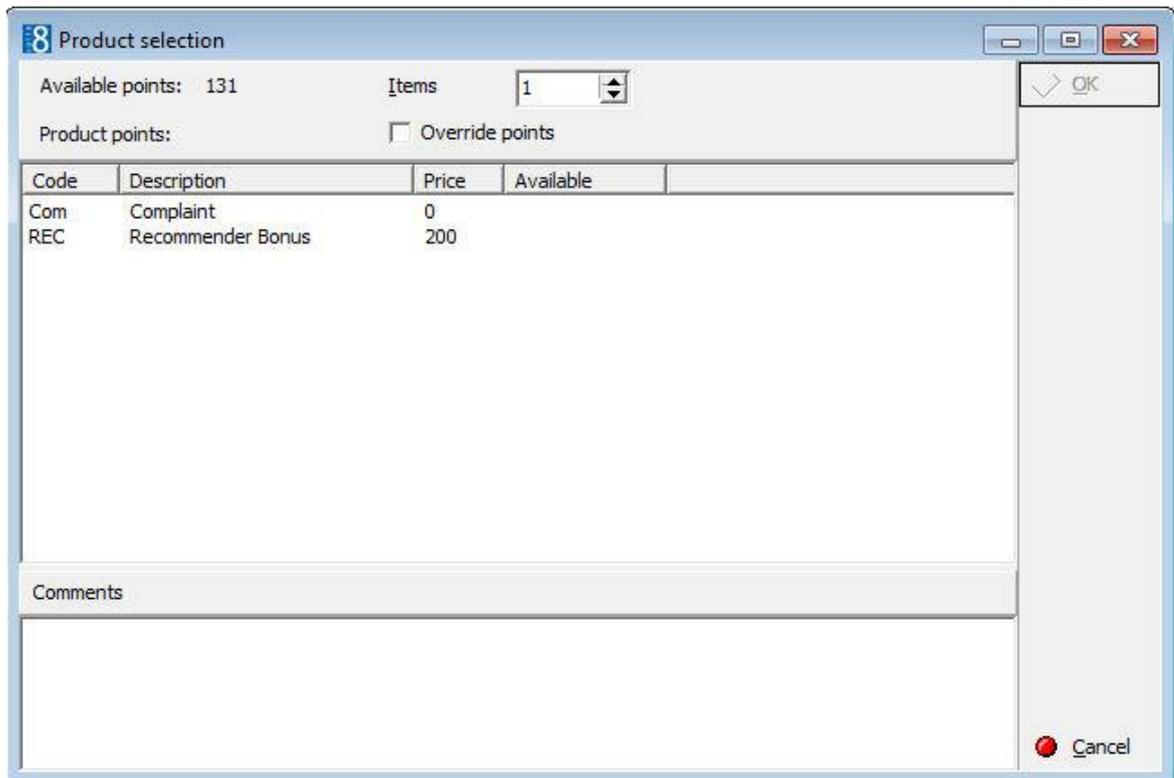
1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS to display the Bonus Point Cards screen.
2. Select the required membership card and click POINTS to display the Bonus Points dialog box.

The screenshot shows the 'Bonus points' dialog box for guest Herr Tino Meier. It displays membership details and a grid of transactions. The grid has columns for Transaction, Earned, Redeemed, Remaining, Consumed, Type, Expiry, and Product. The current balance is 131 points.

Transaction	Earned	Redeemed	Remaining	Consumed	Type	Expiry	Product
Point	5		5	0	First stay	15/11/13 11:23:24 AM	
Point	6		6	0	Nights	15/11/13 11:23:24 AM	
Point	27		27	0	Revenue %	15/11/13 11:23:24 AM	
Point	70		70	0	Department %	15/11/13 11:23:24 AM	
Point	5		5	0	Department %	15/11/13 11:23:24 AM	
Point	1		1	0	Department %	15/11/13 11:23:25 AM	
Point	20		17	3	Enrollment	23/11/13 4:57:07 PM	
Redemption		3			Redemption		

3. Click ADD POINT to display the Product selection dialog box.

Product points may be awarded as compensation for a complaint or as an incentive, for example, when a guest introduces another member to the membership program.



4. Select a product and click OK.

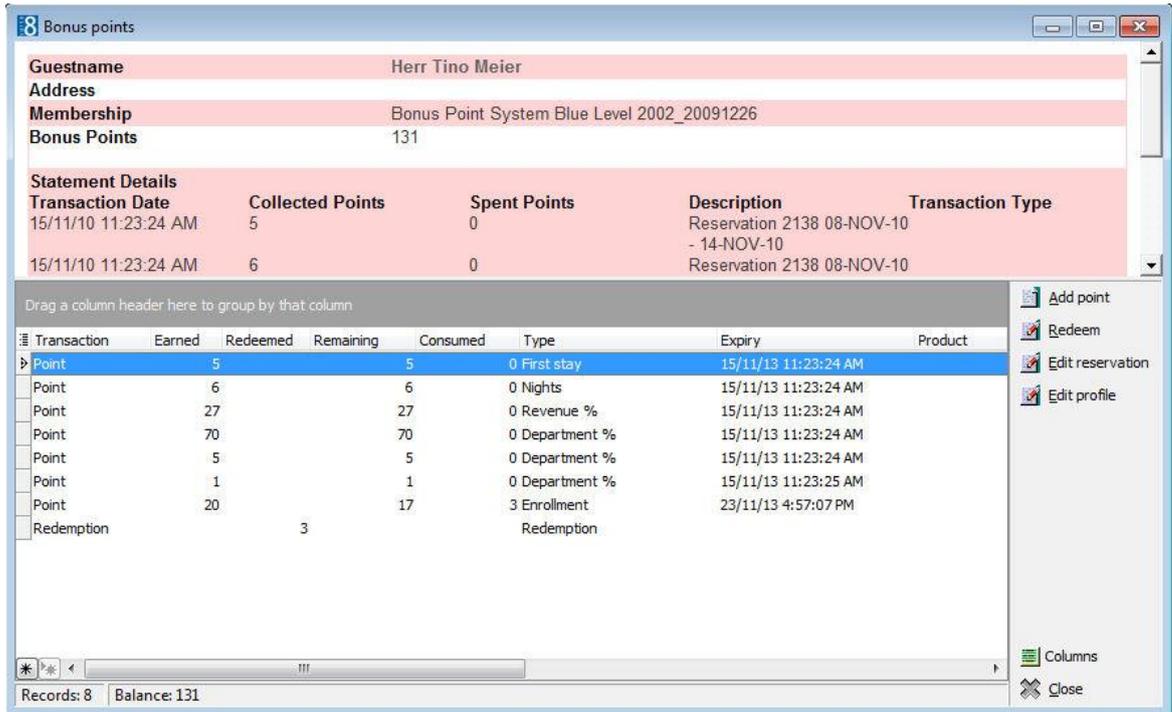
or

5. Select **VERRIDE POINTS** and enter the number of points to be manually awarded; click OK.

The points are added to the membership card and displayed on the bonus point screen.

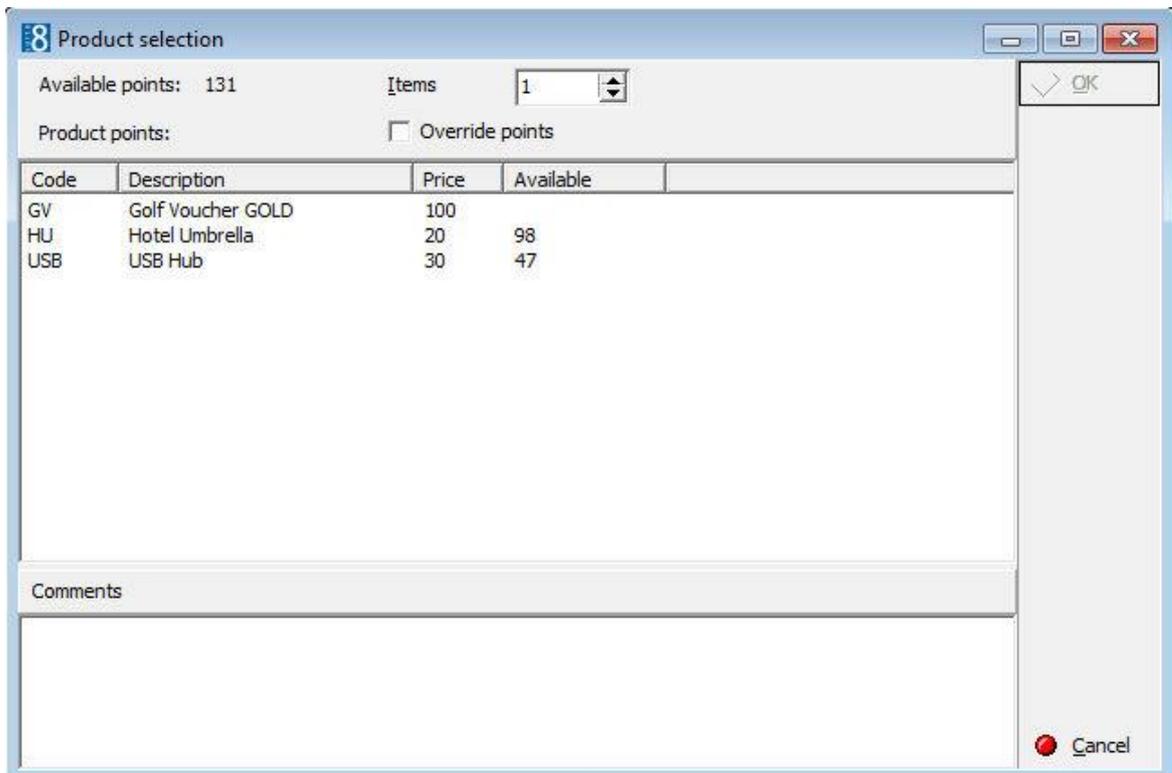
How to redeem points

1. Click the **CUSTOMER RELATION** menu and select **BONUS POINT CARDS** to display the Bonus Point Cards screen.
2. Select the required membership card and click **POINTS** to display the Bonus Points dialog box.



3. Click REDEEM to display the Product selection dialog box.

Product points may be used to 'purchase' products offered by the membership program.



4. Select the required product and click OK.
5. If the product is to be purchased for a different number of points select OVERRIDE POINTS and enter the number of points to be manually redeemed; click OK.

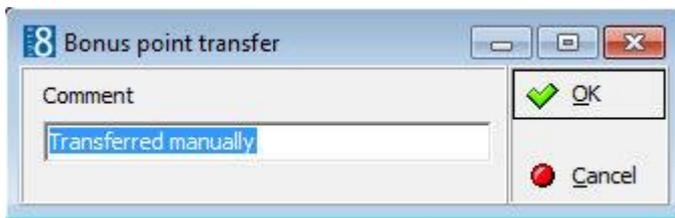
The number of points redeemed are subtracted from the membership card and displayed on the bonus point screen.

How to transfer points

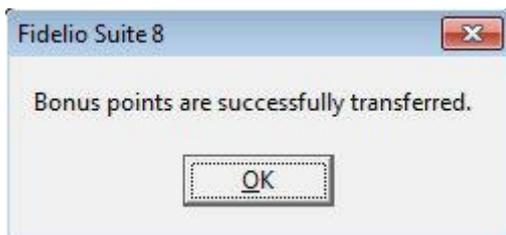
1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.
2. Select the required membership card and click TRANSFER POINTS to display the Bonus Points Cards dialog box.
3. Search for the required card member and click SELECT.



4. Enter the number of points to transfer and click OK.



5. Enter a reason or comment for the transfer of the points and click OK.
A message is displayed to confirm that the points were successfully transferred.



6. Click OK to close the message

The number of points transferred are subtracted from the membership card.

Transferred points are detailed on the Bonus Points screen.

- Points which have been transferred are marked as TRANSACTION TYPE 'Redemption', the number of points transferred are indicated in the REDEEMED column and in the TRANSFER column the card number of the member the points have been transferred to.
- Points which have been transferred are marked as TRANSACTION TYPE 'Point', the number of points received are indicated in the EARNED column and in the TRANSFER column the card number of the member the points have been transferred from.

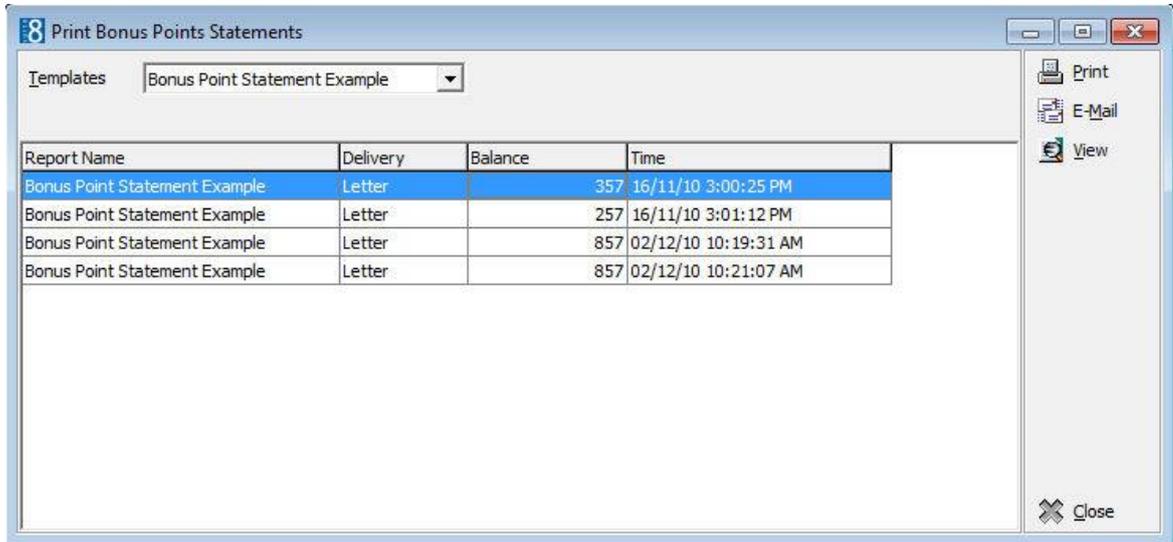
Note: Transferred points are detailed on the Bonus Points screen.

Points which have been transferred are marked as TRANSACTION TYPE 'Redemption', the number of points transferred are indicated in the REDEEMED column and in the TRANSFER column the card number of the member the points have been transferred to.

Points which have been received are marked as TRANSACTION TYPE 'Point', the number of points received are indicated in the EARNED column and in the TRANSFER column the card number of the member the points have been transferred from.

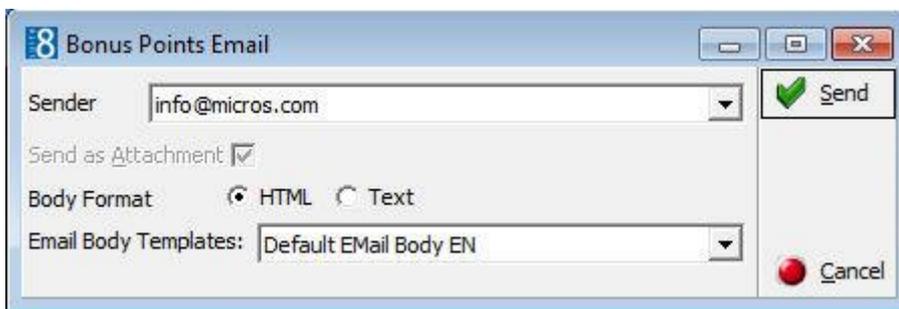
How to send statements

1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.
2. Select the required membership card; multiple membership cards can be selected in order to print the statements as a batch.
3. Click STATEMENTS to display the Print Bonus Points Statements dialog box.



4. In the TEMPLATES box click the drop-down arrow and select the template to be used.
5. Click PRINT to print the bonus point statement.
6. Click E-MAIL to send the bonus point statement by email.

The Bonus Points Email dialog box is displayed.



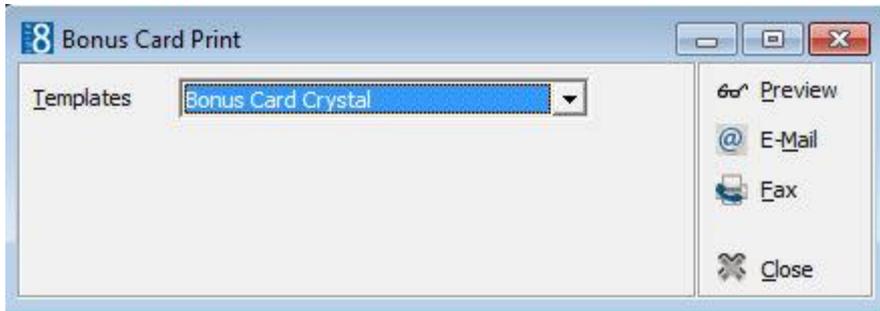
7. The SENDER defaults to the user's email address or the hotel's email address if the signed on user does not have an email address defined.
8. Select the BODY FORMAT HTML or Text; HTML is selected by default.
9. In the EMAIL BODY TEMPLATES box click the drop-down arrow and select the template to be used.
10. Click SEND.

The document is generated and the email sent to the primary email address of each of the selected membership cards.

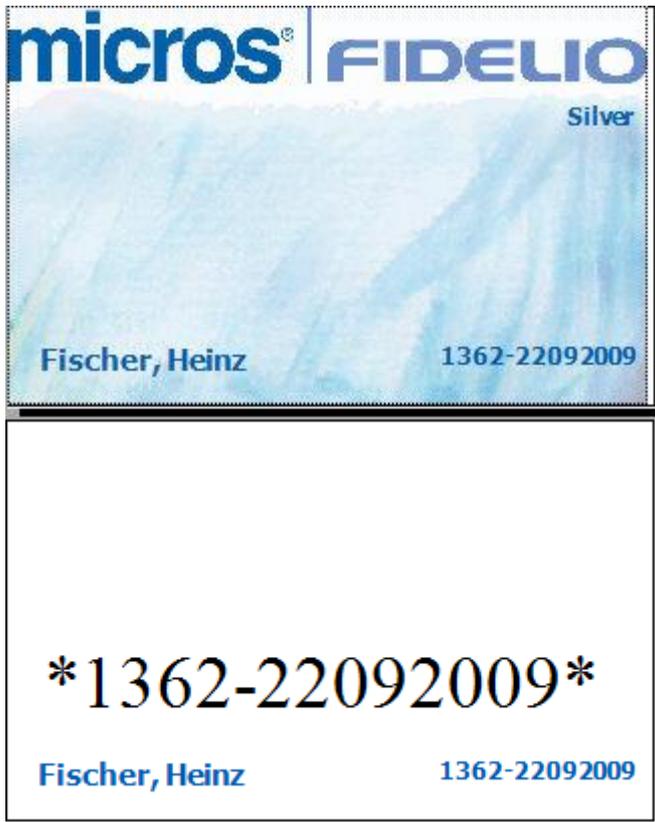
Note: The VIEW option may be used to display statements previously printed or sent by email.

How to print a bonus card

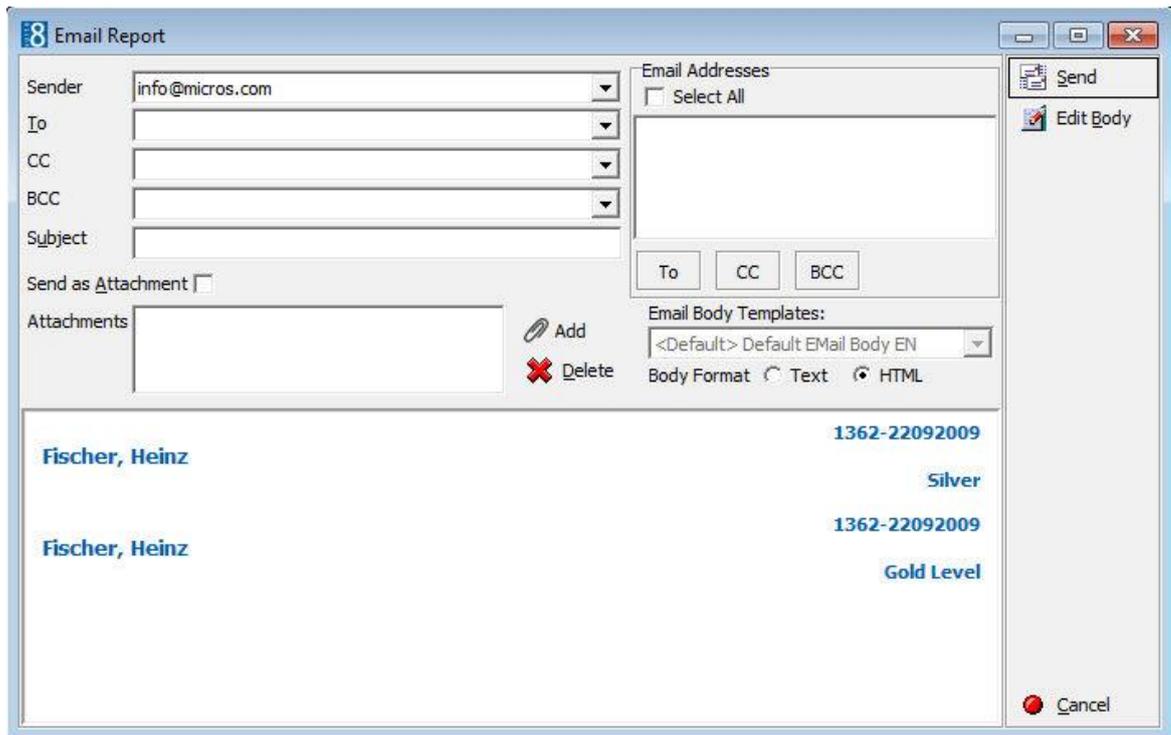
1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.
2. Select the required membership card and click PRINT CARD to display the Bonus Card Print dialog box.



3. In the TEMPLATES box click the drop-down arrow and select the template to be used.
4. Click PREVIEW to display a preview of the bonus card; the card can be printed by clicking the printer icon on the preview screen.



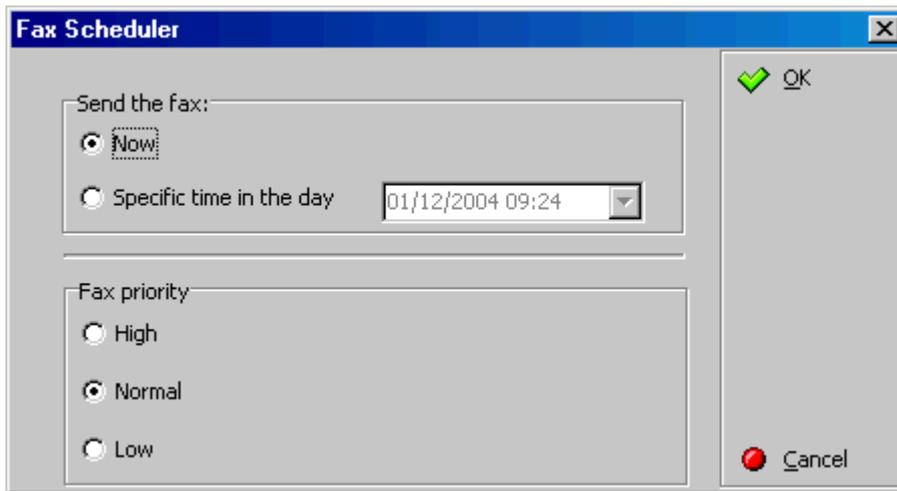
5. Click E-MAIL to send the bonus card by email.
The Email Report dialog box is displayed.



6. Complete the email details and click SEND.
The document is generated and the email sent.
7. Click FAX, to send by fax, the document is generated and the Send Fax dialog box displayed.



8. The To box is automatically completed with the fax number from the guest profile.
9. To edit the fax click EDIT, the document is generated and displayed on the screen. Depending on the setup of your system either MS Word or the Fidelio Internal editor application will be used to display the document.
10. Make sure that all the entered information is correct; any necessary changes can be made at this time.
11. To schedule the time the fax should be sent, click ADVANCED, the Fax Scheduler dialog box is displayed.



12. Select when to SEND THE FAX, the default is NOW, to specify a specific date and time select a SPECIFIC TIME IN THE DAY and enter the date and time to send the fax.
13. Select the FAX PRIORITY, the default is Normal.
14. Click OK.
15. Click Send, the document is generated and the fax sent.

Note: Reports in the section with the section role Bonus Cards are available for printing cards.

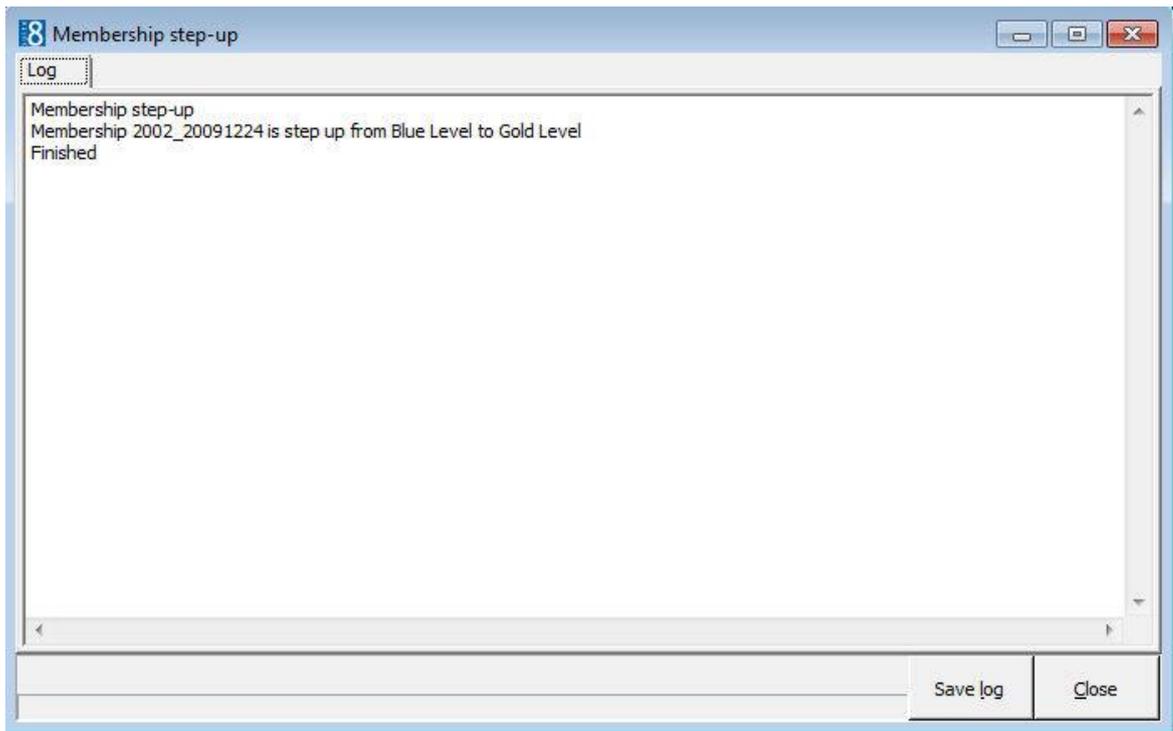
How to step up memberships

1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.
2. Search for and select the required membership card, multiple membership cards can be selected.
3. Select STEP UP MEMBERSHIP LEVEL from the OPTIONS menu.

A message is displayed asking if you want to step-up the selected membership?



4. Click YES; a log is displayed listing the memberships which have been stepped up and to which level they have been stepped up.



5. Click SAVE LOG to save the membership step up log or click CLOSE.

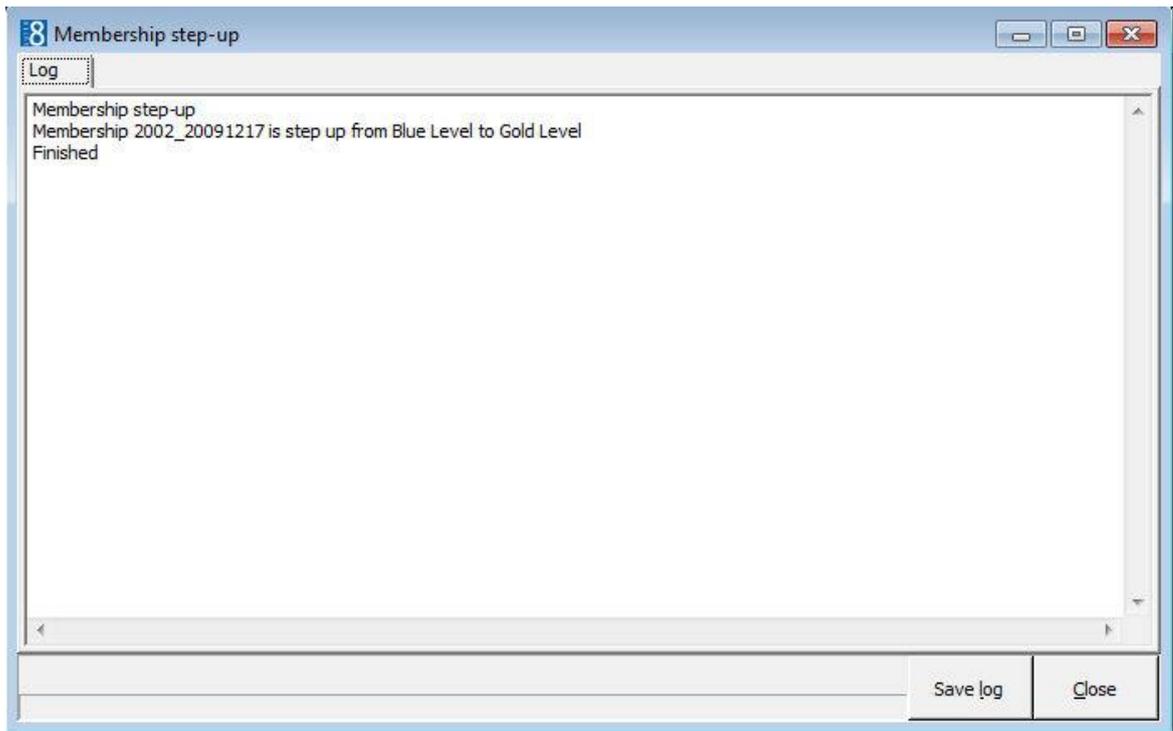
How to force step up membership level

1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.
2. Search for and select the required membership card, multiple membership cards can be selected.
3. Select FORCE STEP UP MEMBERSHIP LEVEL from the OPTIONS menu.

A message is displayed asking if you want to force step-up the selected memberships even if they did not reach the limit yet?



4. Click YES; a log is displayed listing the memberships which have been stepped up and to which level they have been stepped up.

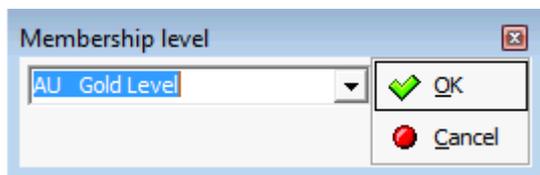


5. Click SAVE LOG to save the membership step up log or click CLOSE.

How to set a membership level manually

1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.
2. Search for and select the required membership card, then select SET MEMBERSHIP LEVEL MANUALLY from the OPTIONS menu.

The Membership level dialog box is displayed.



3. Select the required membership level and click OK.

A message is displayed asking if you want to change the membership level of the selected membership?

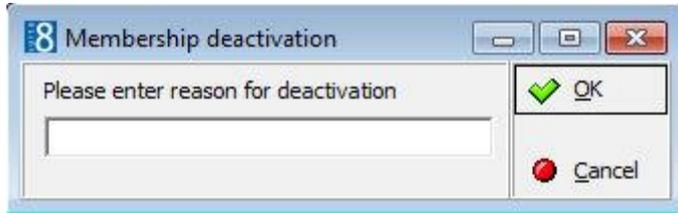


4. Click YES to change the membership level.

How to deactivate a membership level

1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.
2. Search for and select the required membership card, then select DEACTIVATE MEMBERSHIP from the OPTIONS menu.

The Membership deactivation dialog box is displayed.



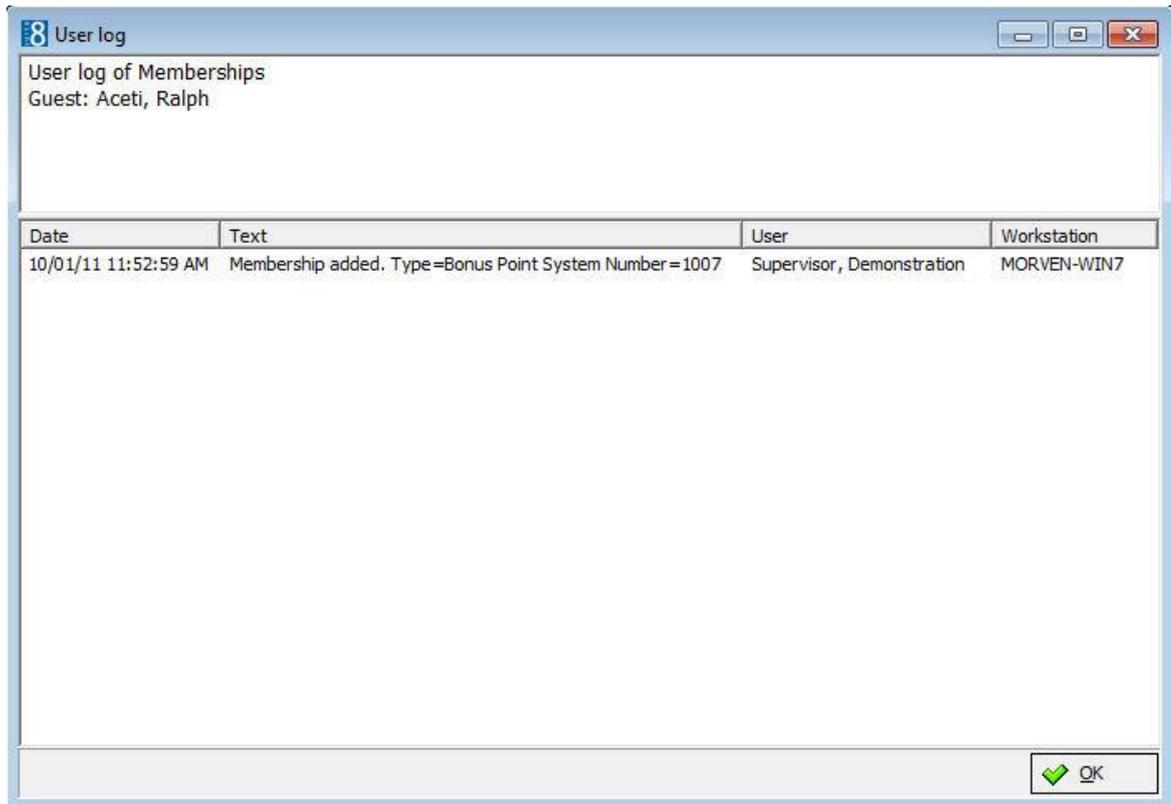
3. Enter a reason for the deactivation and click OK.

The membership is deactivated.

How to view the user log

1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.
2. Search for and select the required membership card, then select LOG from the OPTIONS menu.

The User log dialog box for the selected membership card is displayed.



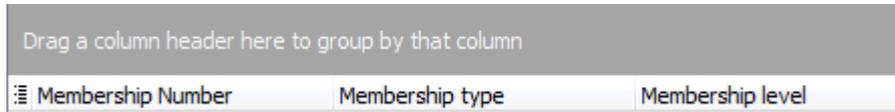
The type of log entries displayed are dependant upon the membership options selected in the user log configuration.

3. Click OK to close the user log.

How to change/reset the grid display

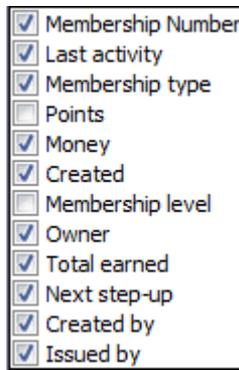
1. Click the CUSTOMER RELATION menu and select BONUS POINT CARDS.

The currently defined column headings are displayed.



2. To display the list by a specific column type; drag the column header to the area above the column headings.
3. To sort the columns into ascending or descending order click the column header.
4. To change the displayed columns click the show/hide/move columns icon  on the left-hand side of the column headings

The available columns list is displayed with the currently selected columns indicated by a tick mark.



5. Select or clear the check boxes next to the column headings as required.

The new column heading layout is displayed as each column is selected or cleared.

Reset

6. To reset the column headings back to the default, click the COLUMNS button on the lower right-hand side of the screen.
7. Select REMOVE EVERY CUSTOMIZATION to reset the columns.

Note: The Bonus Point Cards dialog box can be accessed directly from the profile by selecting the Display button on a card membership.

- Bonus point cards functionality is controlled by the license code BONUS POINTS under Setup → Miscellaneous → Licence → V8 Sublicenses → Property Management.
- Bonus point card functionality required the definition of a Membership Type with the role BONUS POINT (FREQUENT FLYER) under Setup → Configuration → CRM → Membership Types.
- The relevant membership changes are displayed in the user log if the options MEMBERSHIP STEP UP, MEMBERSHIP ADDED, MEMBERSHIP MODIFIED, MEMBERSHIP DELETED are selected under Setup → Configuration → Users → User Log → Customer Management.
- Statement sending requires that a template with the section role BONUS POINTS be created under Miscellaneous → Reports.
- The printing of a membership card requires that a template with the section role BONUS POINT CARD be created under Miscellaneous → Reports.
- Default email body text can be defined via the option EMAIL BODY DEFAULT under Setup → Configuration → Email Settings → Email Body Default.

-
- A default email body text can be defined for bonus point cards, per language for the selected user via the USER DEFINITION → MISCELLANEOUS TAB under Setup → Configuration → Users → User Definition.

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