

Oracle® Hospitality Suite8

Mailing Wizard User Manual



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Oracle Hospitality Suite8 Mailing Wizard User Manual Release 8.14.0.0

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Preface

Audience

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

Customer Support

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

<https://support.oracle.com>

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
October, 2016	<ul style="list-style-type: none">• Initial documentation
November 2017	<ul style="list-style-type: none">• Update of title to be valid for 8.10.1 and higher versions
February 2018	<ul style="list-style-type: none">• Release 8.12.0.0
August 2018	<ul style="list-style-type: none">• Release 8.13.0.0
March 2019	<ul style="list-style-type: none">• Release 8.14.0.0

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Mailing Wizard Installation and User Guide

Introduction

This document outlines the configuration and describes the functionality of the sql-based mailing wizard available from Version 8.14 onwards.

Feature Availability

The functionality is only available when the global setting Charge It - Enable Direct Article Payment under **Setup > Configuration > Global Settings > Billing > Billing3** is **activated**.

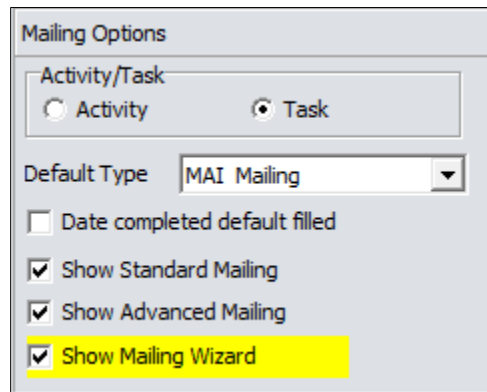
Prerequisites

- Suite8 Version 8.14 or higher

2 Configuration

Global Settings

Go to Suite8 **Configuration->Global Settings->Profile1 tab** activate the flag Show Mailing Wizard



Mailing Options

Activity/Task
 Activity Task

Default Type MAI Mailing

Date completed default filled

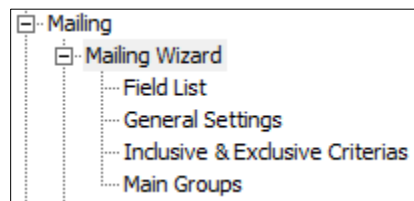
Show Standard Mailing

Show Advanced Mailing

Show Mailing Wizard

Setup

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



NOTE:

A basic setup of the configuration will be provided when updating to or installing Suite8 version 8.14

Main Groups

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

8 Mailing Wizard Main Groups

Code

Description

Remarks

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

Inclusive and Exclusive Criteria

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

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

8 Mailing Wizard Details

Code MAI

Description Mailing Codes

Main Group MAR Marketing

Remarks Mailing Codes

SQL

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

OK

Parameters

Cancel

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

8 Mailing Wizard Parameter

Role String with data selection

Linked Detail MAI Mailing Codes

Multiple

Table Name XPDA

Table Field XPDA_SHORTDESC

Parametername CODE_MAI

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

Field 1 XPDA_SHORTDESC

Field 2 XPDA_LONGDESC

Field 3

Description

Remarks

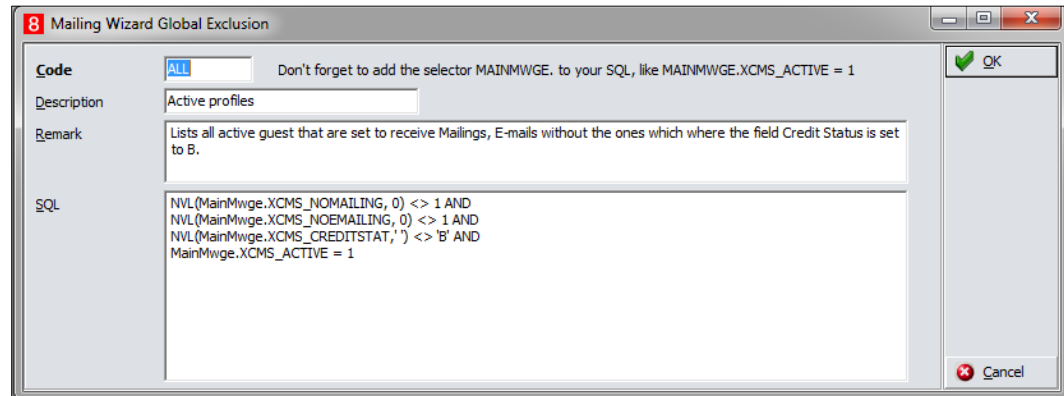
OK

Cancel

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

General Settings

The general settings contain sql statements to define general filter.



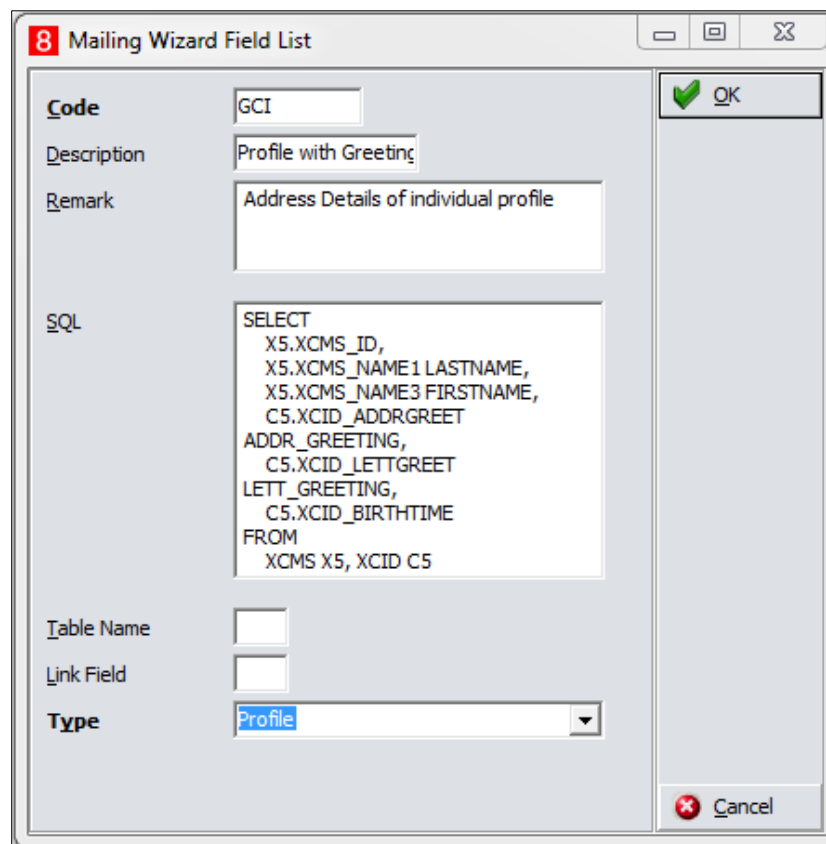
The screenshot shows the 'Mailing Wizard Global Exclusion' dialog box. It has a title bar with a red '8' icon and the text 'Mailing Wizard Global Exclusion'. The dialog contains several fields: 'Code' with the value 'ALL', 'Description' with 'Active profiles', 'Remark' with 'Lists all active guest that are set to receive Mailings, E-mails without the ones which where the field Credit Status is set to B.', and 'SQL' with a complex SQL query. The SQL query is:

```
NVL(MainMwge.XCMS_NOMAILING, 0) <> 1 AND  
NVL(MainMwge.XCMS_NOEMAILING, 0) <> 1 AND  
NVL(MainMwge.XCMS_CREDITSTAT, ' ') <> 'B' AND  
MainMwge.XCMS_ACTIVE = 1
```

 There are 'OK' and 'Cancel' buttons on the right side.

Field List

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



The screenshot shows the 'Mailing Wizard Field List' dialog box. It has a title bar with a red '8' icon and the text 'Mailing Wizard Field List'. The dialog contains several fields: 'Code' with 'GCI', 'Description' with 'Profile with Greeting', 'Remark' with 'Address Details of individual profile', and 'SQL' with a SQL query:

```
SELECT  
  X5.XCMS_ID,  
  X5.XCMS_NAME1 LASTNAME,  
  X5.XCMS_NAME3 FIRSTNAME,  
  C5.XCID_ADDRGREET  
  ADDR_GREETING,  
  C5.XCID_LETTGREET  
  LETT_GREETING,  
  C5.XCID_BIRTHTIME  
FROM  
  XCMS X5, XCID C5
```

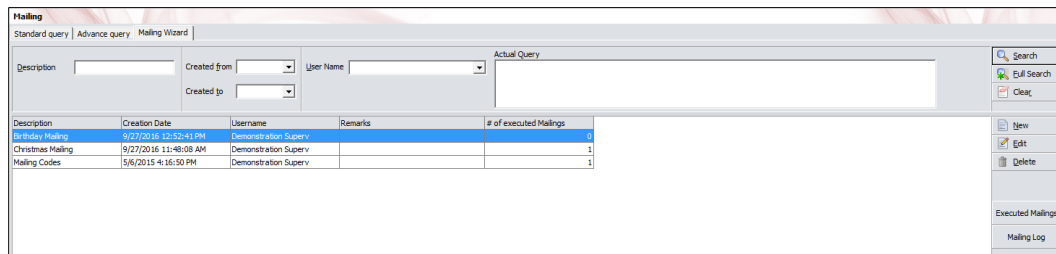
 There are also 'Table Name' and 'Link Field' fields which are empty, and a 'Type' dropdown menu set to 'Profile'. There are 'OK' and 'Cancel' buttons on the right side.

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

3

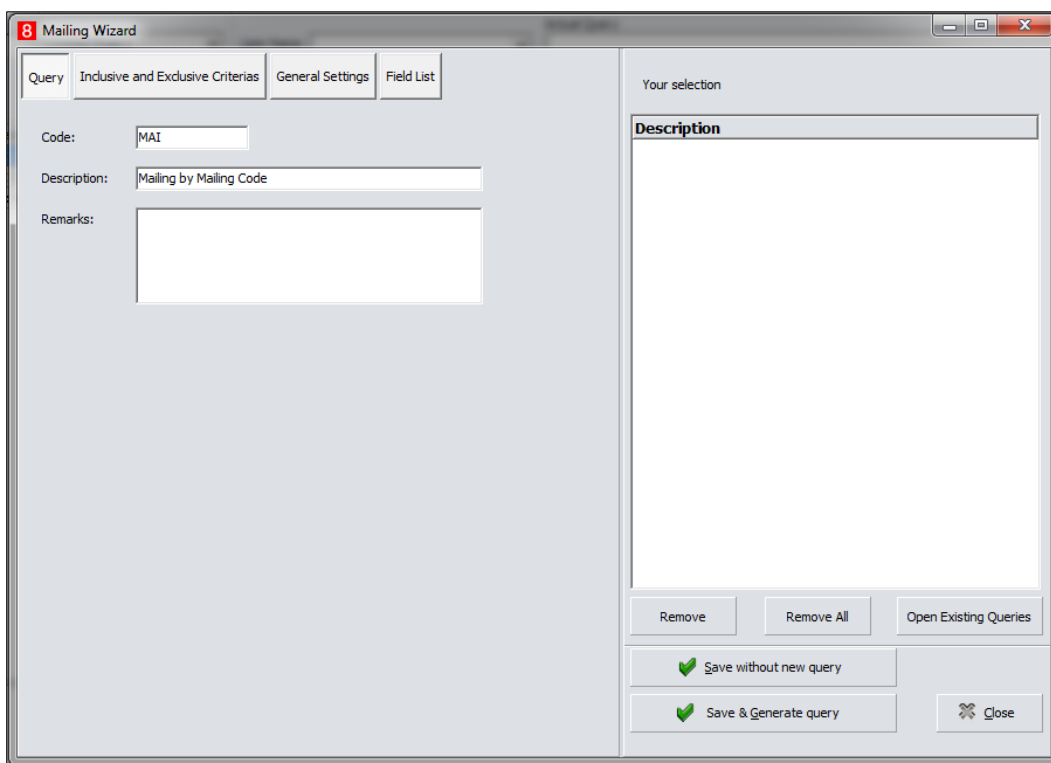
Mailing Wizard

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



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

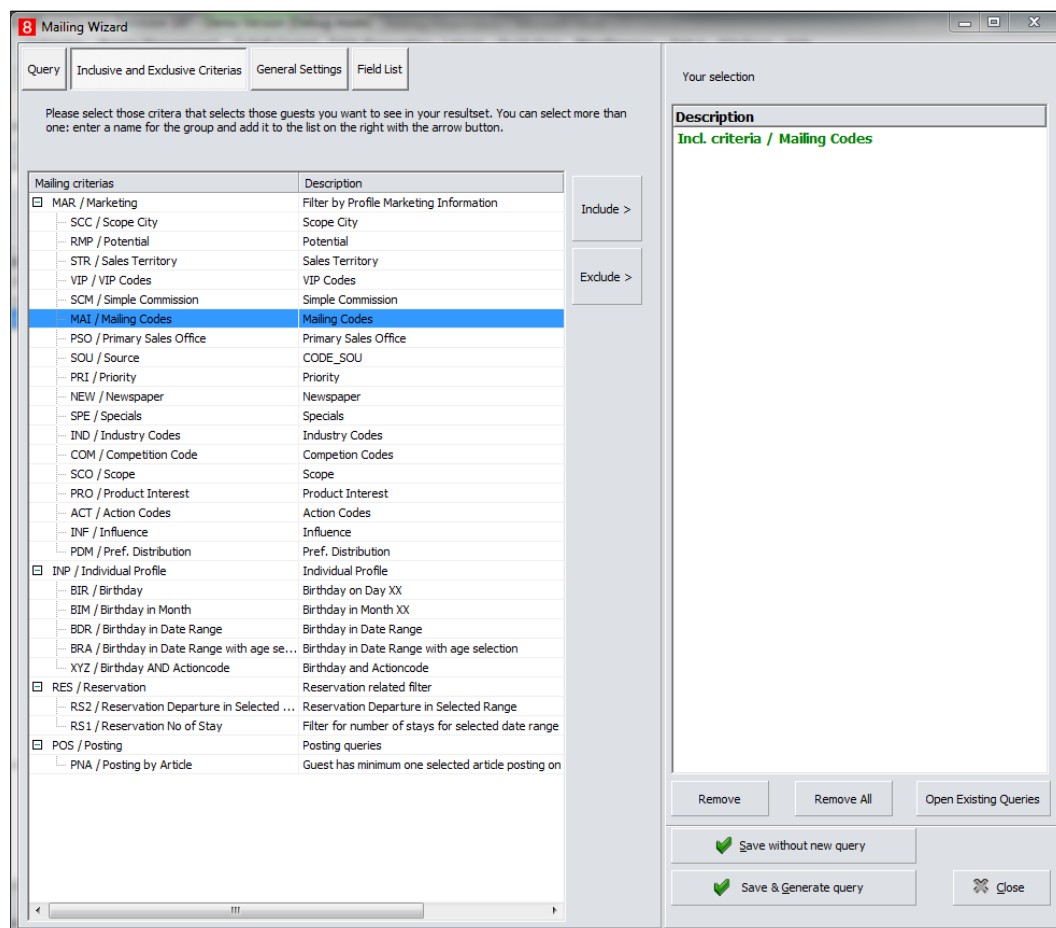
Query



1. **Code:** Enter a code.
2. **Description:** Enter the description of the mailing.

3. **Remarks:** enter additional remarks.
4. Click on **Inclusive & Exclusive Criteria**.

Inclusive & Exclusive Criteria

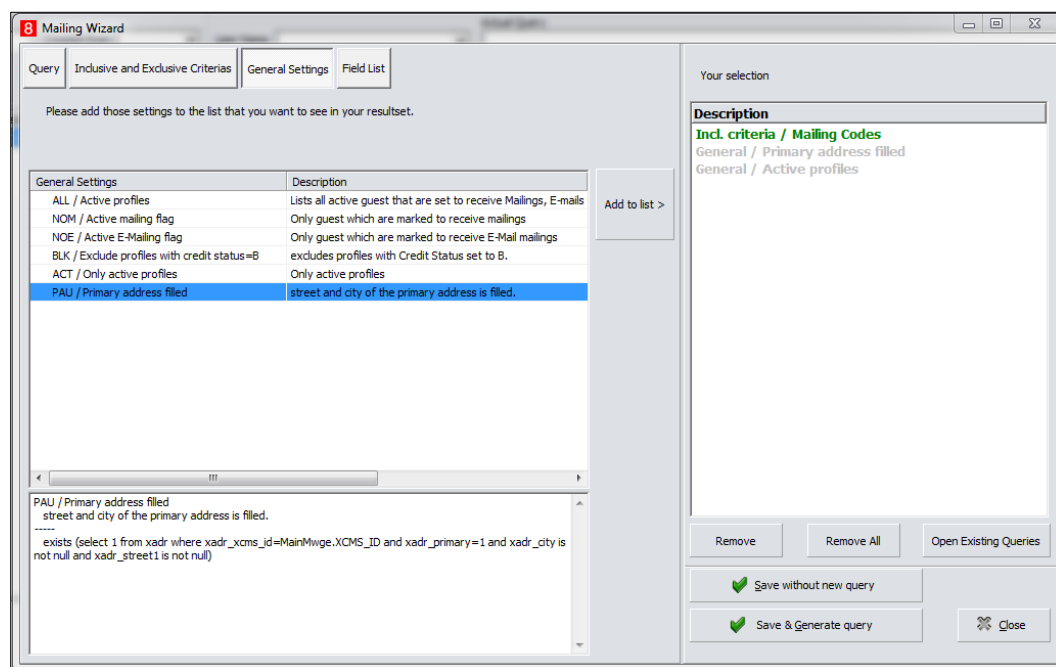


1. Select the according criteria and select **Include** to define if the criteria should be included or **Exclude** if it should be excluded.
2. **Remove:** removes a single selected criteria.
3. **Remove all:** removes all selected criteria.
4. **Open existing Query:** Shows the screen to run the mailing.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

 **NOTE:**

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

General Setting

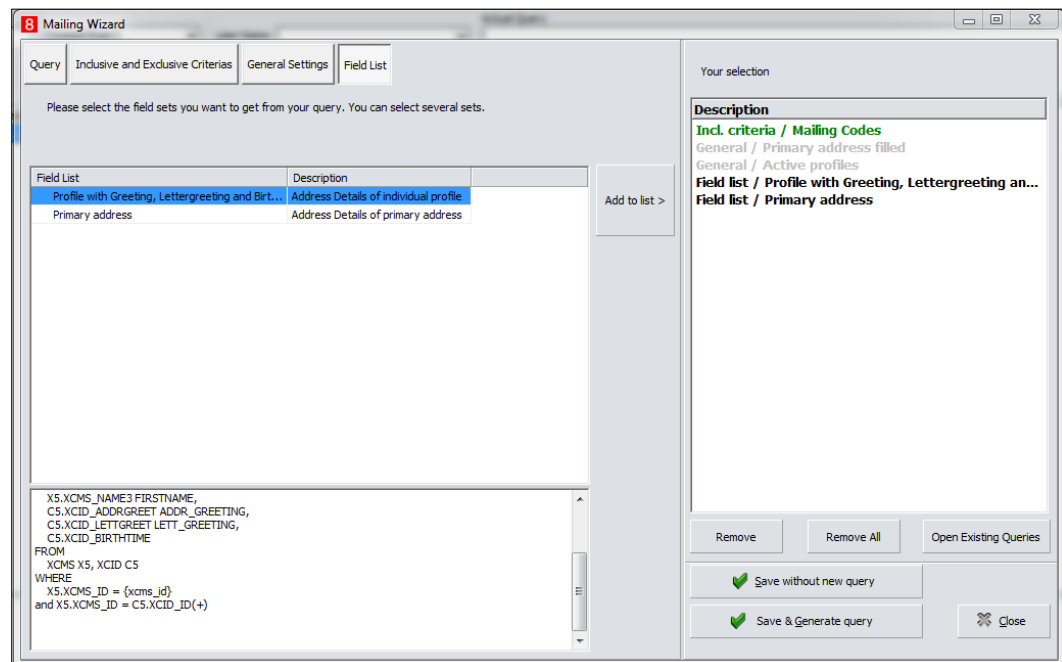


1. Add the valid settings for the profiles to the list.
2. Select **Field List**.

 **NOTE:**

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

Field List



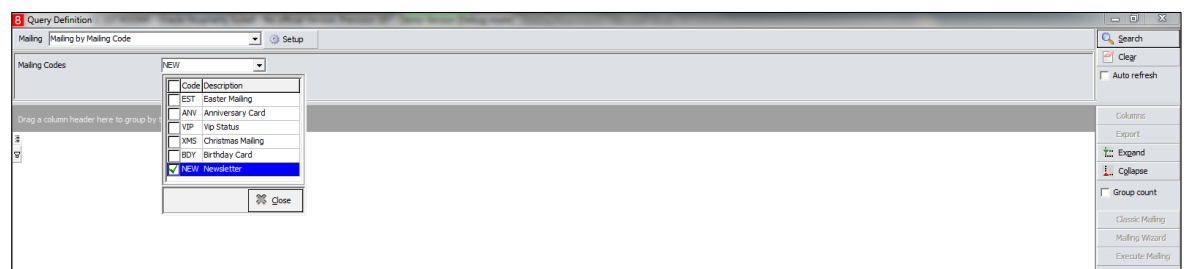
1. Add the according field list.

NOTE:

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

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

Query Definition



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

3. Click **Search** to run the mailing query.

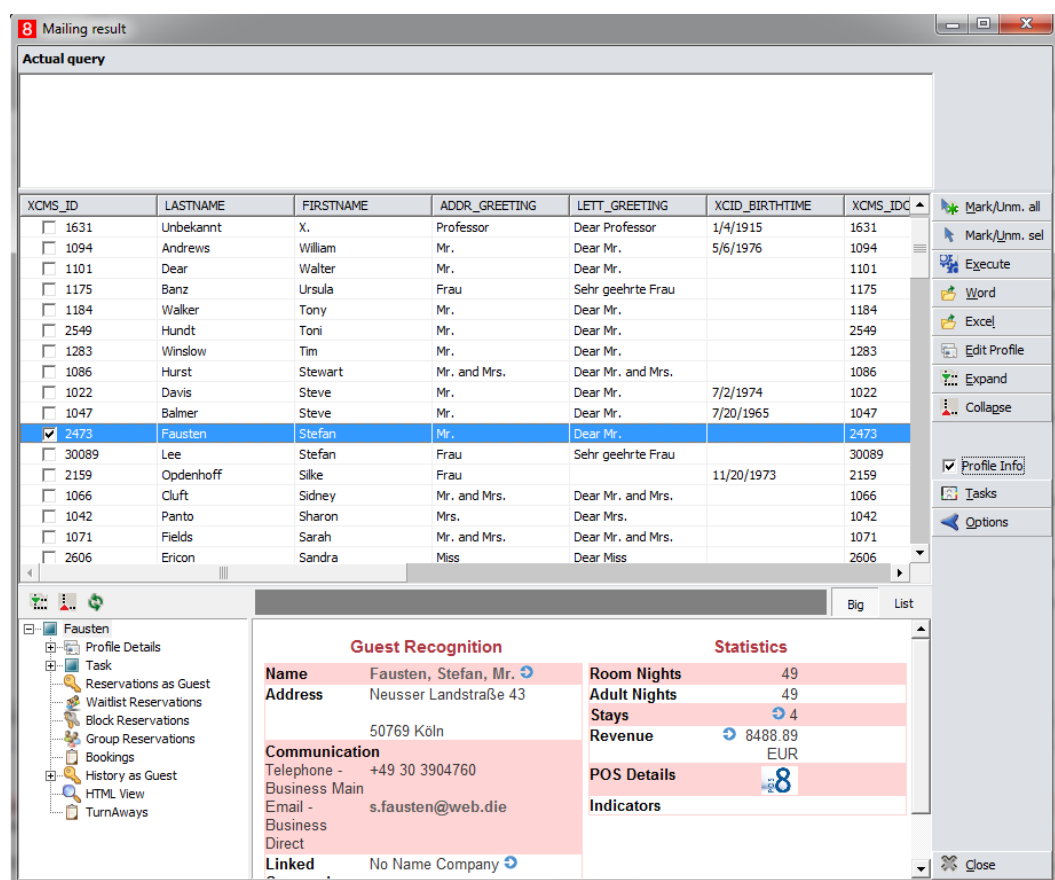
The screenshot shows the 'Query Definition' window in the Oracle Mailing Wizard. The window title is '8 Query Definition'. It has a 'Mailing Codes' dropdown set to 'NEW' and a 'Setup' button. The main area is a table with columns: XCMS_ID, LASTNAME, FIRSTNAME, ADDR_GREETING, LETT_GREETING, XCID_BIRTHTIME, XCMS_IDOS133, STREET1, STREET2, and STREET3. The table contains 26 rows of data. On the right side, there is a 'Columns' panel with options: Search, Clear, Auto refresh, Columns, Export, Expand, Collapse, Group count, Classic Mailing, Mailing Wizard, and Execute Mailing. Below the table, there are two summary sections: 'Guest Recognition' and 'Statistics'. The 'Statistics' section shows: Room Nights: 49, Adult Nights: 49, Stays: 4, Revenue: 8488.89 EUR, and POS Details: 8. The 'Records: 86' indicator is visible at the bottom left of the table area.

XCMS_ID	LASTNAME	FIRSTNAME	ADDR_GREETING	LETT_GREETING	XCID_BIRTHTIME	XCMS_IDOS133	STREET1	STREET2	STREET3
2473	Fausten	Stefan	Mr.	Dear Mr.			2473 Neusser Landstraße 43		
1542	Brumm	Michaela	Miss	Dear Miss			1542 Krayete 5		
1148	Chagal	Jaques	Madame et Monsieur	Madame et Monsieur	10/5/1966		1148 1 Rue de la MontMatre		
1098	Bloom	Donald	Mr. and Mrs.	Dear Mr. and Mrs.			1098 102 Marshall Avenue		
1285	Edwards	Mark	Mr.	Dear Mr.			1285 92 Penrose Road		
2083	Bader	Michael	Herr	Sehr geehrter Herr Prof. Dr.	8/11/1992		2083 Biterweg 22		
1629	Schmidt	F. P. H.	Herr Prof. Dr.	Sehr geehrter Herr Prof. Dr.			1629 Budapest Str. 100		
2005	Wielhandt	Manfred	Herr	Sehr geehrter Herr			2005 Grenzwehr 4		
1299	Smith	Duncan		Dear Mr.			1299 36 Glen William Road		
1194	Walker	Tony	Mr.	Dear Mr.			1194 10 Chiltern Drive		
1159	Kennedy	Peter	Mr. and Mrs.	Dear Mr. and Mrs.			1159 91 Adelaide Drive		
2398	Molter	Joachim	Herr Prof. Dr.	Sehr geehrter Herr Prof. Dr.			2398 Schaningerplatz 5		
1283	Windsow	Tim	Mr.	Dear Mr.			1283 Magasinsgatan 2		
1041	World Wide Travel						1041 49 Chelsea Bridge Road		
1076	Freedman	Harry	Mr. and Mrs.	Dear Mr. and Mrs.			1076 42 North Plaza		
1182	Arlhusten	M	Mr.	Dear Mr.			1182 5 Rue Paul Gauguin		
1097	Bennett	Lee	Mr.	Dear Mr.			1097 5609 Wiltshire Boulevard		
1873	Bond	Hans-Joachim	Herr	Sehr geehrter Herr			1873 Kersovanga 1		
1095	Barta	Joe	Mr.	Dear Mr.			1095 460 Pont San Bruno Boulevard		
1047	Balmer	Steve	Mr.	Dear Mr.	7/20/1965		1047 4420 Wiltshire Boulevard		
1272	Parkinson	Nigel		Dear Mr.			1272 4644 Tolme St		
1042	Pants	Sharon	Mrs.	Dear Mrs.			1042 36 Herdbourne Villas		
1238	Perfect Conferences						1238 45 Great Ormond Street	Second Floor	
1250	Bernard Matthews Ltd						1250 PO Box 2244		
1178	Affrat	Claude	Madame et Monsieur	Madame et Monsieur			1178 87 Rue Charcot		
1054	Bennett	Carol	Mr.	Dear Mr.	12/28/1977		1054 27 Goolagong Avenue		

Guest Recognition		Statistics	
Name	Fausten, Stefan, Mr.	Room Nights	49
Address	Neusser Landstraße 43	Adult Nights	49
	50769 Köln	Stays	4
Communication		Revenue	8488.89 EUR
Telephone - Business Main	+49 30 3904760	POS Details	8

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

Mailing Result



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

Guest Recognition		Statistics	
Name	Fausten, Stefan, Mr.	Room Nights	49
Address	Neusser Landstraße 43 50769 Köln	Adult Nights	49
Communication	Telephone - +49 30 3904760 Business Main Email - s.fausten@web.die	Stays	4
Linked	No Name Company	Revenue	8488.89 EUR
		POS Details	8
		Indicators	

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

 **NOTE:**

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