Oracle® Hospitality Suite8

Upsell User Manual

ORACLE®

Oracle Hospitality Suite8 Upsell User Manual Release 8.10.2 and higher

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Preface

Audience

The Upsell User Manual 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 and any associated log files

- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at
http://docs.oracle.com/en/industries/hospitality/

Revision History

Date	Description of Change
April 2017	• Initial documentation
November 2017	• Update of title to be valid for 8.10.2 and higher versions
February 2018	• Release 8.12.0.0
August 2018	• Release 8.13.0.0
March 2019	• Release 8.14.0.0
July 2019	• Updated for terminology changes

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Upsell Functionality

Introduction

This document outlines the configuration and describes the functionality of the Upsell functionality available from Version 8.10.2 on.

Feature Availability

The functionality is only available if the global setting **Upsell** is set under Setup > **Configuration** > **Global Settings** > **Reservation** > **4 Reservation**.

Prerequisites

Suite8 Version 8.10.2 or higher

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Configuration

Global Settings

1. Activate the setting Upsell under **Configuration > Global Settings** > **Reservation** > **4 Reservation.**
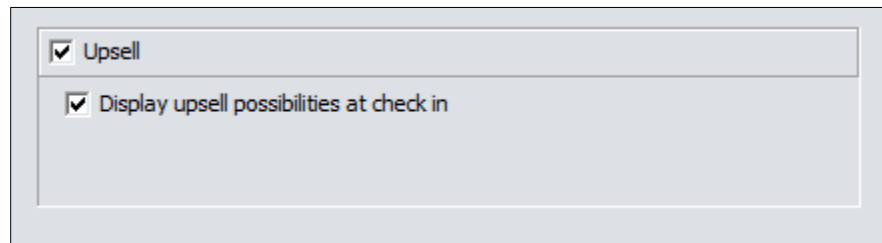
2. Activate the option Display upsell possibilities at check in to prompt users upon check-in when upsell is available. If you do no enable the setting, users will have to manually check if upsell is available.

Setup

- Go to **Configuration** > **Reservations** > **Upsell.**
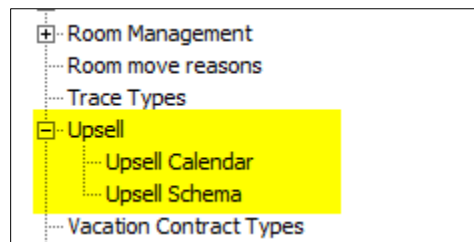
Upsell Schema

The upsell schema defines the upsell rules and amounts, for example, what criteria needs to be met for a guest to get this offer.

1. Filter / Search options

*   **Text**: You can enter a free text. It filters all records where the text can be found in any field and it is not case sensitive.

*   **Extend view with RT details: If you select it,** not only the overall schema information is displayed, but also one record per **from – to room type** is displayed. This allows you to easily see the amounts defined per room type.

> ✎ **NOTE:**
>
> All search option are related with an AND condition

2. Click **New** or **Edit** to open the configuration screen

Code	**Enter a code of this schema**
Name	Enter a name
Package (optional)	Select a package for this upsell. When a package is selected, then this will be linked to an upsold reservation and charges are posted against the department code of the package. The price will still be taken from the schema. This can be used for statistical purposes.
Package frequency (optional)	Select the frequency of the package posting.
Department Code (Mandatory if no package is selected)	Select the department code to post the automatic upsell charge.
Memberships (optional)	If you select membership types which are presented with this upsell option, then only reservations with the selected membership type are offered the upsell.
Rate Code (optional)	If you select rate codes which are presented with this upsell option, then only reservations with any of the selected rate codes are offered the upsell.
Availability limit group (optional)	When a group is selected, then the defined limit control will be compared against this group, and not against the general availability.
Any guest membership	Should the membership card linked to any profile be checked for eligibility, or only the guest profile? If you enable it, then linked profiles are checked as well.
Marketing Information	You can enter a free text. This text will be displayed during reservation check-in and is meant to aid the receptionist to sell an upgrade.
Inactive	Here you can set the record inactive.

Button Prices

Here you can define for each room type a price which will be charged when upgraded to another room type. If any combination does not have a value, then no upsell offer will be displayed for this room type.

> **NOTE:**
>
> The upsell price is always **flat per room**. There is no calculation based on occupancy.

Prices in Reverse

Here you can also enter the prices, similar to the **Prices** screen, but the axis are switched. In the Grid the **from room type** is displayed.
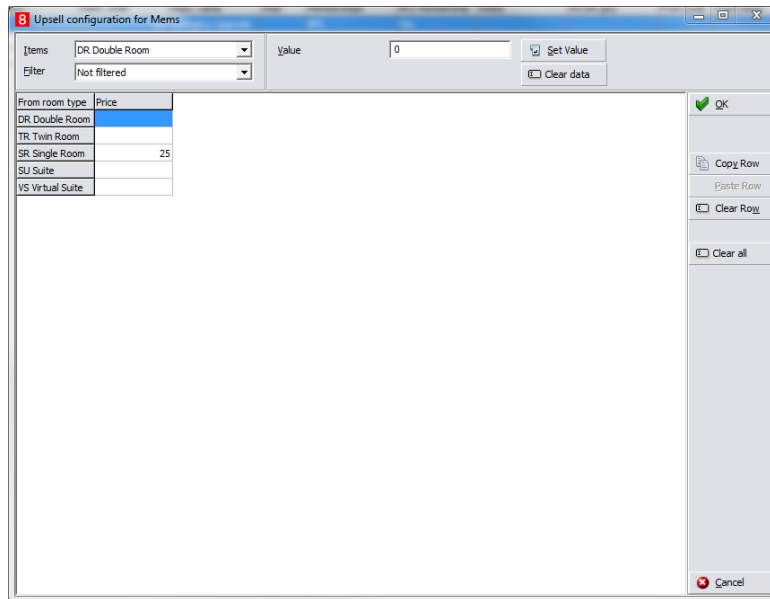
> **NOTE:**
>
> The prices can be defined either in **Prices** or **Prices in reverse** – they will be shown in both screens.

Limit Control

Here you define the limits of how many rooms can be upsold to this category. If the schema is setup to use an availability limit group then values are compared to the limit group. If multiple criteria are entered, the first one reached will be applied.

Min. availability	**The room type can only be upgraded to, until the entered availability has been reached.**
Min. availability %	The room type can only be upgraded to, until the entered availability percentage is reached.
Maximum Number	Maximum number this room type can be upsold to.

Upsell Calendar

In the upsell calendar section you can define periods at which certain upsell schemas are available.

1. Click **New** or **Edit** to edit the configuration screen.

|	
Schema	**Select the schema the period is set up for.**
From date	Select the date the period starts
To date	Select the date the period ends
Override schema price	When you enable this option then the buttons Prices/Prices in reverse become available, and you can define prices which override whatever is setup in the schema. Use this functionality if you have often different prices based on season etc. You could set up a schema without prices and define them per calendar period. Rules when to apply and to what department code are still taken from the selected schema.
Override schema limit control	When you enable this option, then the button Limit control becomes available and you can set different controls which will override the limits set on the schema.

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Upsell Functionality

When you check in a guest, Suite8 will check if upsell options exist based on the reservation room type, the reservation rate code, membership types and the LOS.

In case there are multiple schemas valid for an upgrade of the same room type the system will always offer the one with the lowest price.

1. Select the upsell option the guest agrees to and click Select or close the screen without selecting any upsell option.
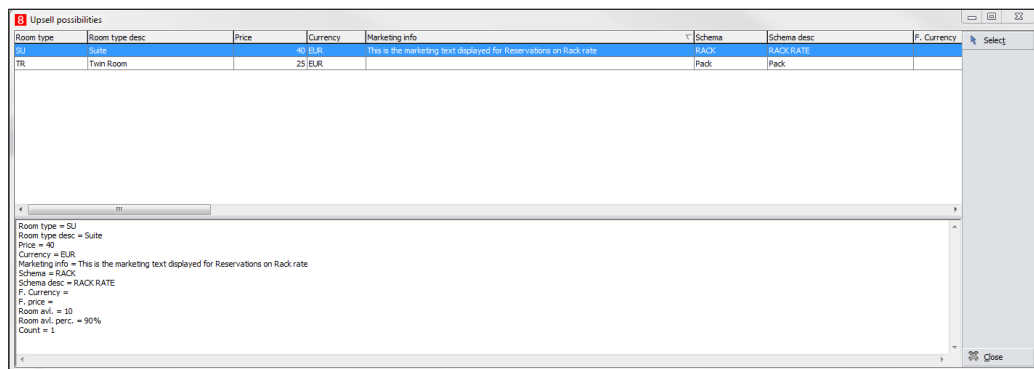
2. If you selected an upsell, the reservation edit screen will indicate this with a new **Upsell** button at the bottom of the screen. When you press this button, a short info is displayed showing the most important info about the upsell. Depending on the setup of the schema either the package is linked to the reservation or a fixed charge is added using the department code and price from the upsell schema.
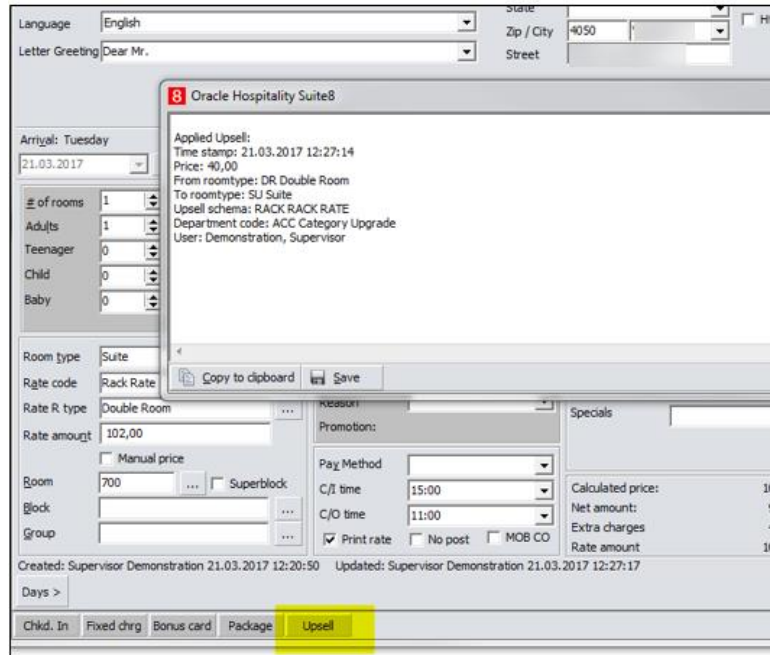
Rate Query (Ctrl + R)

You can also open the configuration of the upsell calendar and schema via the **Rate Query** screen.