Siebel

Hospitality Guide

June 2021

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Hospitality Guide

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

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1 What's New in This Release

What’s New in Siebel Hospitality Guide, Siebel CRM 21.6 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Configuring the Function Space Diary Icons	Modified topic. As of Siebel CRM 21.2 Update, in the Siebel Application Interface installation, web artifacts for application configurations, which were formerly located in **applicationcontainer\webapps\siebel**, now map to **applicationcontainer_external\siebelwebroot**. This directory contains subdirectories such as **files**, **fonts**, **htmltemplates**, **images**, **migration**, **scripts**, and **smc**. For more information, see *Siebel Installation Guide* .

What’s New in Siebel Hospitality Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Overview of Siebel Hospitality

Overview of Siebel Hospitality

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

- *About Siebel Hospitality*
- *Business Purposes of Screens in Siebel Hospitality*
- *Viewing Information on the Hospitality Home Page (User)*

Note: The procedures in this guide assume that you do not use the Tree navigation control option to access screens and views. However, you can choose to use the Tree navigation control if required. For more information about setting navigation options, see *Siebel Fundamentals Guide* .

About Siebel Hospitality

The hospitality industry provides venues for many kinds of events, including conferences, meetings, celebrations, seminars, and so on. Siebel Hospitality is designed to help event planners and event operations personnel in hospitality firms to improve their efficiency when performing the following business tasks:

- Planning for all sizes of events, including large events that consist of multiple *functions*, such as lectures, workshops, demonstrations, banquets, and so on
- Reserving necessary space and equipment for each event function
- Ordering necessary supplies for each event function
- Setting up for event functions
- Providing promised goods and services during each event
- Billing accurately for goods and services provided during each event

Siebel Hospitality can be used along with other *Siebel Business Applications* (all applications that comprise Siebel CRM) such as Oracle's Siebel Sales, Oracle's Siebel Call Center, and Oracle's Siebel Service. Add-on modules to many applications are also compatible with Siebel Hospitality.

Business Purposes of Screens in Siebel Hospitality

This topic describes the purposes for which administrator and end-user screens are used in Siebel Hospitality. This topic contains the following topics:

- *Purposes of Siebel Hospitality Administration Screens*
- *Purposes of Siebel Hospitality End-User Screens*

Purposes of Siebel Hospitality Administration Screens

The following table describes the business purposes served by administration screens that have been created or modified specifically for use in Siebel Hospitality.

Screen	Purpose
Assets	Used to enter information about individual assets that your organization has available, including where each asset is located.
Category Administration	Used to organize products (goods and services) into categories such as food and beverages, audiovisual equipment, and so on. Categories can be further divided into subcategories to allow each subcategory to be taxed appropriately. Category management is specific to Siebel Hospitality.
Data Administration	Used to define addresses, list of values (LOVs), sales assessment templates, and so on.
Function Space Administration	Used to define function space inventory and asset inventory display properties.
Guest Conveniences Administration	Used to define airports and booking centers.
Pricing Administration	Used to specify a range of prices for each product or service you offer. In Siebel Hospitality, each price list can be designated for use at specific properties.
Product Administration	Used to define combinations of goods and services as product packages for events.
Property Administration	Used to set up properties and attributes for each property such as sleeping rooms, property styles, day parts, and so on.
Property Pricing Administration	Used to set up pricing information and additional details for each property such as function space pricing, sleeping room pricing, discounts, unavailable spaces, and so on.
Tax Service Admin	Used to specify charge codes, taxes, and service charges, and associate taxes with properties.

Purposes of Siebel Hospitality End-User Screens

The following table describes the business purposes served by end-user screens that have been created or modified specifically for use in Siebel Hospitality.

Screen	Purpose
Accounts	Used to create and manage account information.
Activities	Used to create and manage activities.

Screen	Purpose
Calendar	Used to manage a user's days, weeks, and months.
Contacts	Used to create and manage contact information.
Evaluations	Used by revenue managers to review submitted quotes. Evaluation records can be viewed by property or across all organizations.
Event Checks	Primarily a read-only screen used to retrieve more detail about generated event checks. Also can be used to cancel an invoice.
Function Space Diary	Displays a Scheduler showing function space bookings over periods, which are configurable. For example, you can filter the data by start date and time scale.
Functions	Used to review, add, and modify information about functions within proposed and accepted events, including line items for necessary goods and services. Also used to reserve assets, such as audiovisual equipment, for specific functions. All views for the Functions screen are specific to Siebel Hospitality.
Histories	Used to add historical opportunities, quotes associated with an opportunity, and functions and room blocks associated with a quote. You can create a collection of historical data to associate with current opportunities.
Home	A group of lists that provides a snapshot of the most important information to manage for a daily workload. The Home screen also provides links to opportunities, quotes, orders, invoices, and activities.
Opportunities	Used to create opportunities and to add or modify information about proposed and accepted events. Also used to associate past and future opportunities with a selected current opportunity.
Orders	Used to specify goods and services supplied during an event. Also used to generate trial checks and finalize the charges that appear on event invoices.
Property	Used to display detailed property information including inventory, quotes, opportunities, sell notes, and so on.
Quotes	Used to modify property-specific quotes and create new quotes.
Room Blocks	Used to display all room block line item records for the property with which you are associated.
Turnover Evaluations	Used to display details of turnovers. Allows an event manager to conduct a detailed analysis of the turnover checklist questions and to view quote details.

Viewing Information on the Hospitality Home Page (User)

When you log in to Siebel Hospitality, the Hospitality home page appears. The home page is a combination of lists that provides a snapshot of the most important information that you must have to manage a daily workload.

The purpose of the home page is to alert you to recent status changes and to provide quick access to other views with additional functionality. When you click a link within a record, Siebel Hospitality shows the detail form and associated view tabs of the record. For example, selecting a record in the My Opportunities list and then clicking the link in the Opportunity Name link takes you to the detail form and associated view tabs for the current opportunity.

The home page only displays the information for which you have visibility permissions. These permissions are defined in each user's profile. Depending on the type of user, the Hospitality home page can include some or all of the following lists:

- My Opportunities
- My Quotes
- My Evaluations
- My Turnover Quotes
- All Orders
- All Event Checks
- My Current Activities
- My Transferred Quotes

You can configure the Home page to customize the information that appears. For example, the number of records displayed in each list on the home page can be changed. Lists on the home page typically display five records; you can scroll to additional records.

You can also edit the home page layout to specify which sections are displayed. These changes remain in effect until you make new changes. For more information on home page layout controls, see *Siebel Fundamentals* .

3 Getting Started with Siebel Hospitality

Getting Started with Siebel Hospitality

This chapter lists the application administration tasks that are specific to Siebel Hospitality. This chapter includes the following topics:

- *Roadmap for Setting Up Siebel Hospitality*
- *Process of Setting Up Hospitality Workflows*
- *Activating the TNT Event Check Status State Model*
- *Process of Configuring Opportunities and Quotes*
- *Disabling Date Synchronization*

Roadmap for Setting Up Siebel Hospitality

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

> **Note:** The Siebel Bookshelf is available on Oracle Technology Network (OTN) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Siebel Applications Administration Guide covers the setup tasks that are common to all of Oracle's Siebel Business Applications, such as using license keys, defining employees, and defining the structure of your company. The guide also provides the information that you must have to perform data administration and document administration tasks.

Some tasks discussed in this chapter replace the corresponding tasks in *Siebel Applications Administration Guide* , whereas others are additional tasks. Make sure you review the following table in this topic before following the procedures in *Siebel Applications Administration Guide* .

This chapter assumes that you have already performed the following operations:

- Installed or completed the upgrade of Siebel Hospitality, and created the Siebel Administrator account that is used to perform the tasks described in this guide. For more information, see *Siebel Installation Guide* . If you are upgrading, see *Siebel Database Upgrade Guide* .
- Completed general Siebel application setup procedures, such as adding employees, assigning positions and responsibilities, setting visibility rules, and so on. For more information about the user authentication environment and how visibility works, see *Siebel Security Guide* .

Administrative Task	Description	For More Information
Workflow process activation	Set up Siebel Hospitality-specific workflows to process data and run some application behaviors.	*Process of Setting Up Hospitality Workflows* *Siebel Business Process Framework: Workflow Guide*

Administrative Task	Description	For More Information
State model activation	Activate the TNT Event Check Status state model by defining activation and expiration dates that span a current and future time period.	*Activating the TNT Event Check Status State Model*
Assignment Manager setup	Set up Assignment Manager to automate the assignment of event-related activities to a person or team, as defined by specific assignment rules. Assignments rules can be based on any combination of criteria, including business workflow policies, employee skills, workload, and territory or account team definitions.	*Siebel Assignment Manager Administration Guide*
Opportunity quotes administration	Set parameters to control behaviors of quotes generated from an opportunity.	*Process of Configuring Opportunities and Quotes*
View dates configuration	Control the date synchronization behavior of certain views that display two or more date ranges.	*Disabling Date Synchronization*
Property administration	Set up property records and property characteristics.	*Setting Up Properties*
Function space, sleeping room, and suite administration	Create function space records, sleeping room records, suite records, and property-specific setup styles.	*Setting Up Function Spaces, Sleeping Rooms, and Suites*
Product line administration	Set up product lines for sleeping rooms and generic catering products.	*Siebel Product Administration Guide*
Product and asset administration	Group products into parent categories, child categories, and subcategories. Define generic catering products, room blocks, and assets.	*Setting Up Products and Assets* *Siebel Product Administration Guide*
Menus and packages administration	Set up menus and packages as property-specific complex products.	*Setting Up Property-Specific Menus and Packages*
Inventory control administration	Set up function space, sleeping room, and suite inventory controls.	*Setting Up Inventory Controls*
Function space administration	Set up day parts, status indicators, and translations for a property.	*Defining Day Parts, Status Indicators, and Setup Style Translations*
Tax code, service charge, and charge code administration	Set up tax codes, service charges, and charge codes for a property.	*Setting Up Charge Codes, Taxes, and Service Charges* *Siebel Pricing Administration Guide*
Product and property pricing administration	Create price lists for each property. Define the rates for function space, sleeping rooms, and suites. Set profit thresholds and pricing discounts.	*Setting Up Pricing and Property Pricing*

Administrative Task	Description	For More Information
Meeting package setup	Create and maintain complete meeting packages and their associated components as generic objects.	*Setting Up Meeting Packages*
Event template setup	Create opportunity and quote event templates for event types that occur regularly.	*Defining Event Templates*
Contact and account creation	Define Hospitality accounts and contacts.	*Siebel Applications Administration Guide*
Proposal Generator setup	The proposal generator automatically creates agreement proposals from selected quotes.	*Siebel Applications Administration Guide*
Function Space Diary setup	Perform setup and configuration tasks for the Function Space Diary.	*Process of Configuring the Function Space Diary*
Turnover template setup	Use the Sales Assessment Template view to create a template for turnover tasks.	*Siebel Applications Administration Guide*
Reports setup	Configure headers, logos, and fields for Hospitality reports. Set up report text for taxes and service charges.	*Roadmap for Administering Hospitality Reports* *Siebel Reports Guide*

Process of Setting Up Hospitality Workflows

Siebel Hospitality includes multiple workflow processes. These workflow processes help carry out some Siebel Hospitality functionality behind the scenes. For more information about workflow processes, see *Siebel Business Process Framework: Workflow Guide* .

To set up Hospitality workflows, perform the following tasks:

1. *Activating Hospitality Workflows*
2. *Verifying That Hospitality Workflows Are Active*
3. *Generating Database Triggers for Hospitality Workflows*
4. *Triggering the TNT SHM Quote Group Workflows with Workflow Monitor Agent*
5. *Running the Nightly Hospitality Workflows*

This process is a step in *Roadmap for Setting Up Siebel Hospitality*.

Activating Hospitality Workflows

The workflow setup process includes activating a set of default workflows that are included in the Siebel Hospitality application. You must activate multiple workflows before the application is available to users.

> **CAUTION:** If you do not complete this task, although much of the application will be operable, some functionality might not work properly. For example, clicking the Create Quote button does not automatically generate quotes for the specified properties unless the appropriate workflow is active.

This task is a step in *Process of Setting Up Hospitality Workflows*.

To activate Hospitality workflows

1. Navigate to the Administration - Business Process screen, then the Workflow Deployment view.
2. Complete the steps for activating a workflow, as described in the chapter about administering a workflow in *Siebel Business Process Framework: Workflow Guide* .

   The Siebel Hospitality workflows to be activated are listed in the following table.

Workflow Name	Description
SHM Go to View	This workflow allows navigation to a view. Other workflows call this workflow as a subprocess.
SHM Open Check	This workflow checks whether the selected order is associated with an event check. If the order is not associated with an event check, this workflow creates an event check with no line items.
SHM Open Checks	This workflow is similar to the SHM Open Check workflow. The SHM Invoice Process business service calls this workflow.
SHM Post Check	This workflow checks whether or not an order is associated with an event check. If the order is associated with an event check, then it replaces the line items and sets the event check Status to Posted.
SHM Post Checks	This workflow is similar to the SHM Post Check workflow. The SHM Invoice Process business service calls this workflow.
SHM Recalculate Invoice Items	This workflow re-creates the current event check when a user clicks the Recalculate button.
SHM Trial Check	This workflow is similar to the SHM Post Check workflow. This workflow sets the status of the event check to Trial.
SHM Trial_Open Check	This workflow creates an event check with a Status of Open or Trial, depending on whether a user clicks the Open Check button or the Trial Check button.
SHM Voiding Process	This workflow cancels an event check for an order. This workflow creates a new event check with a status of Open, and associates the new event check with the same order.
TNT Apply Package	This workflow creates the functions, nonfunction line items, and room blocks of the selected meeting package in the current quote or event check.

Workflow Name	Description
TNT Nightly 30 60 90 Day Pickup	This workflow checks for quotes with arrival dates that are 30, 60, and 90 days from the current date, and updates the 30 Day Pick Up, 60 Day Pick Up, and 90 Day Pick Up fields of the associated room block line items.
TNT Nightly Update History Opportunity	This workflow checks for definite quotes that have been modified, and updates the associated historical opportunities.
TNT SHM Create Function Order	This workflow creates an order for a function. If an order already exists for the function, this workflow updates the Order Id field in the function and the function line items, and navigates to the Orders screen.
TNT SHM Create One Quote	This workflow creates a quote with functions and room blocks.
TNT SHM Create Order	This workflow creates a primary order for the selected quote, and associates all quote functions with this order. In addition, this workflow copies all quote function line items to order line items. The Data Transfer Utilities (DTU), which you dynamically configure in the user interface, perform the transformation from quote to order.
TNT SHM Create Quote	This workflow creates a quote for the property that is associated with an opportunity and that the user selects. This workflow copies the Agenda Functions, Room Blocks, and other objects to the quote, and calls the Function Space Inventory (FSI) engine to find the function space that is most consistent with the attributes of each function. In addition, this workflow calculates the total price and expected revenue for the quote. The Data Transfer Utilities (DTU), which you dynamically configure in the user interface, perform the transformation from quote to order.
TNT SHM Optioned Booking Expiry	This workflow sends an email message to the owner of an option-reserved booking so that the owner can accept the booking. If the owner does not accept the booking within a predefined time interval, this workflow changes the status of the booking to Unreserved.
TNT SHM Release Inventory in Quote Prospect Status	This workflow checks the Status field in the quote after a predefined time interval. If the Status field is Prospect, this workflow automatically updates the Inventory Status field to Unreserved for the functions and sleeping rooms that are associated with the quote. Although the inventory is released, the Status field for the functions and sleeping rooms remains Prospect.
TNT SHM Update Quote Status-Date Based	This workflow checks the Decision Date field in the quote. If the decision date passes, and the quote status has not changed to Definite, all inventory is automatically released. This inventory includes Function Space Inventory and Room Block Inventory.

Workflow Name	Description
TNT SHM Update Quote Status-Time Based	This workflow checks whether the quote status is T1 after a predefined time interval. If the status is T1, the inventory is automatically released.
TNT Update History Opportunity	This workflow updates an historical opportunity and the data that is associated with that historical opportunity.
TNT Wrapper Trial_Open Check	This workflow creates an event check with a Status of Open or Trial, depending on whether a user clicks the Open Check/Trial Check button or the Open Day button, by calling the SHM Trial_Open Check Workflow.

Verifying That Hospitality Workflows Are Active

Perform the following steps to verify that each Hospitality workflow process is active.

This task is a step in *Process of Setting Up Hospitality Workflows*.

To verify that Hospitality workflows are active

1. Navigate to the Administration - Business Process screen, then the Workflow Processes view.
2. In the Workflow Processes list, query for the Siebel Hospitality workflows using the following query string in the Name field:

   SHM OR *TNT*
3. Make sure that the value of the Status field in each workflow is Active.

Generating Database Triggers for Hospitality Workflows

The Generate Trigger (GenTrig) component on Oracle's Siebel Server allows you to generate database triggers. Workflow policies use database triggers to identify which records match policy conditions. For more information about database triggers, see the chapter about administering a workflow policy in *Siebel Business Process Framework: Workflow Guide* .

To generate database triggers for the Hospitality workflows, follow this procedure.

This task is a step in *Process of Setting Up Hospitality Workflows*.

To generate database triggers for Hospitality workflows

1. Navigate to the Administration - Server Management screen, then the Jobs view.
2. In the Jobs list, create a new job.
3. In the Component/Job field, select the component with the Name of Generate Triggers.
4. In the Job Parameters list, add new component-specific parameters, using the names and values shown in the following table.

Name	Value
Trigger File Name	Name of the SQL script file, for example, Gentrigger.sql. Any filename can be given.
Privileged User	Table owner name for the Oracle database, for example, ORA31144.
Privileged User Password	Table owner password for the Oracle database, for example, ORA31144.
Exec	True

5. In the Jobs list, with the Generate Triggers job selected, click Submit Job.
6. Verify that the Status field of the Generate Triggers job has a value of Completed.

Triggering the TNT SHM Quote Group Workflows with Workflow Monitor Agent

The *Workflow Monitor Agent* is a functionality that checks when the conditions of a workflow policy are met, and performs actions after those conditions are met. For more information about the Workflow Monitor Agent, see the chapter about administering a workflow policy in *Siebel Business Process Framework: Workflow Guide* .

The TNT SHM Quote workflow group is a subset of Siebel Hospitality workflows. The workflows in TNT SHM Quote group require database triggers in order to run. This procedure sets up the Workflow Monitor Agent to run the workflows in the TNT SHM Quote workflow group using database triggers.

The TNT SHM Quote workflow group includes the following workflows:

- TNT SHM Cancel Quote Functions
- TNT SHM Update Quote Status - Date Based
- TNT SHM Release Inventory in Quote Prospect Status
- TNT SHM Update Quote Status - Time Based
- TNT Update History Opportunity Workflow

The TNT SHM Quote workflow group also encompasses a set of defined policies. Each policy has a condition and an action. Each action specifies a workflow to run. The action is triggered by the condition established in the policy.

To use the Workflow Monitor Agent to trigger the Hospitality workflows in the TNT SHM Quote workflow group, follow this procedure.

This task is a step in *Process of Setting Up Hospitality Workflows*.

To trigger the TNT SHM Quote group workflows with Workflow Monitor Agent

1. Navigate to the Administration - Server Configuration screen, Enterprises, then the Component Definitions view.
2. Query for the component record with the Alias field value of WorkMon.

3. In the Component Parameters list, click Reset and specify the parameter values shown in the following table.

Name	Value
Action Interval	5
Group Name	TNT SHM Quote

4. In the Component Parameters list, click Advanced and specify the parameter values shown in the following table.

Name	Value
Sleep Time	10
Default Tasks	1

5. Restart the Siebel server.

Running the Nightly Hospitality Workflows

Certain workflows for Histories and Futures functionality are designed to be run every night. You can set up Siebel Hospitality to run these workflows automatically through jobs. For more information about the Histories and Futures workflows, see *Workflows for Histories and Futures Functionality*.

To set up jobs to run the nightly Histories and Futures workflows, follow this procedure.

This task is a step in *Process of Setting Up Hospitality Workflows*.

To run the nightly Hospitality workflows

1. Navigate to the Administration - Server Management screen, then the Jobs view.
2. In the Jobs list, create a new job.
3. In the Component/Job field, select the component with the Name of Workflow Process Manager.
4. In the Job Detail Form, complete the fields as shown in the following table.

Field	Value
Repeating	Select
Repeat Unit	Hours
Repeat Interval	24

Field	Value
Repeat From	Scheduled Start

5. In the Job Parameters list, add a component-specific parameter with the value shown in the following table.

Name	Value
Workflow Process Name	TNT Nightly Update History Opportunity Workflow

6. In the Jobs list, with the Workflow Process Manager job selected, click Submit Job.
7. Verify that the Status field of the Workflow Process Manager job has a value of Active.
8. Create another job by repeating Steps 1 through 4 of this procedure.
9. In the Job Parameters list, add a component-specific parameter with the value shown in the following table.

Name	Value
Workflow Process Name	TNT Nightly 30 60 90 Day Pickup Workflow

10. Repeat Steps 6 through Step 7 of this procedure for the new job.

Activating the TNT Event Check Status State Model

A *state model* is a functionality that allows your Siebel application to constrain the state of an object by prescribing allowed state values and allowed state transitions. For Siebel application objects, state models provide a data-driven method for extending control that depends on the state of the object. For more information about state models, see the chapter on state models in *Siebel Applications Administration Guide* .

The TNT Event Check Status state model is defined for the Status field on views of the Event Check screen. This state model enables the selectable values of the Status field to be controlled by the current status. For example, if the current Status is Open, the state model can constrain the next selectable Status values to Void or Cancel (by filtering these values from the existing list of statuses).

The TNT Event Check Status state model is inactive by default. You must activate this state model by defining activation and expiration dates that span a current and future time period.

To activate the TNT Event Check Status state model, follow this procedure.

This task is a step in *Roadmap for Setting Up Siebel Hospitality*

To activate the TNT Event Check Status state model

1. Navigate to the Administration - Application screen, then the State Models view.

2. In the State Models list, query on TNT Event Check Status in the Name field.
3. With the TNT Event Check Status record selected, click the More Info view tab.
4. In the More Info form, perform the following actions:
    a. In the Activation field, select a past date or the current date as the date when the state model becomes active.
    b. In the Expiration field, do one of the following:
        - Select a future date as the date when the state model expires.
        - Set the field to blank (null), so that the state model does not expire.

Process of Configuring Opportunities and Quotes

You can configure some behaviors of opportunities and quotes generated from opportunities by following the procedures in this topic.

To configure the behaviors of opportunities and quotes, perform one or more of the following tasks:

- *Configuring Multiple Quotes to Go Definite*
- *Disabling Opportunity Revenue Updates*
- *Generating Quotes for All Opportunity Properties*

This process is a step in *Roadmap for Setting Up Siebel Hospitality*.

Configuring Multiple Quotes to Go Definite

When multiple quotes are generated from one opportunity, and the status of one of those quotes is set to Definite, then by default, Siebel Hospitality sets the status of the other quotes of that opportunity to Lost/Turndown. However, you can disable the update to non-Definite quotes of the opportunity. In this case, it becomes possible for more than one quote of the same opportunity to go Definite.

When a quote of an opportunity is set to Definite, the status of the other quotes of that opportunity is controlled by the value of the TNT SHM Disable Accept Quote field in the Quote business component. The possible TNT SHM Disable Accept Quote field values are as follows:

- **N (default).** Sets the statuses of all other quotes of the same opportunity to Lost/Turndown.
- **Y.** The statuses of other quotes of the same opportunity do not change, and more than one quote of the same opportunity can go Definite.

This field works together with the TNT SHM Update Opty Rev - Disable user property, which disables the update to the revenue of an opportunity from the revenue of the Definite quote. For more information about the TNT SHM Update Opty Rev - Disable user property, see *Disabling Opportunity Revenue Updates*.

To allow multiple quotes of the same opportunity to be able to go Definite, follow this procedure.

This task is a step in *Process of Configuring Opportunities and Quotes*.

To configure multiple quotes to go Definite

1. Start Oracle's Siebel Tools.
2. Query for the Quote business component and search for the TNT SHM Disable Accept Quote field.

3. Change the value of the TNT SHM Disable Accept Quote field to Y.
4. Compile the SRF file used by your Siebel application.

For more information about changing the values of objects in Siebel Tools, see the chapter on working with objects in *Using Siebel Tools* .

Disabling Opportunity Revenue Updates

When a quote of an opportunity is set to Definite, then by default, Siebel Hospitality updates the revenue of the associated opportunity from the revenue of the Definite quote. However, you can disable this update.

When a quote of an opportunity is set to Definite, what happens to the revenue of that opportunity is controlled by the value of the TNT SHM Update Opty Rev - Disable user property. The possible TNT SHM Update Opty Rev - Disable user property values are as follows:

- **N (default).** Updates the revenue of the associated opportunity from the revenue of the Definite quote.
- **Y.** Disables the update to opportunity revenue when a quote goes Definite.

If you change this user property, you must make the change in the TNT SHM Function Revenue Service business service and in the business component currently used in your UI view. This user property appears in each of the Siebel application objects shown in the following table.

Object Name	Object Type
TNT SHM Function Revenue Service	Business Service
TNT SHM Room Block Rates	Business Component
TNT SHM Room Block Rates - What If	Business Component
TNT SHM Room Block Rates Pending	Business Component
TNT SHM Room Block Rates - Chart	Business Component

This user property works together with the TNT SHM Disable Accept Quote field. If you allow multiple quotes to go Definite (that is, if you change the value of the TNT SHM Disable Accept Quote field to Y), it is recommended that you disable the update to the revenue of an opportunity from the revenue of the Definite quote. For more information about the TNT SHM Disable Accept Quote field, see *Configuring Multiple Quotes to Go Definite*.

To disable the update to opportunity revenue from the revenue of the Definite quote, follow this procedure.

This task is a step in *Process of Configuring Opportunities and Quotes*.

To disable opportunity revenue updates

1. Start Siebel Tools.
2. Query for the TNT SHM Function Revenue Service business service and search for the TNT SHM Update Opty Rev - Disable user property.
3. In the business service, change the value of the TNT SHM Update Opty Rev - Disable user property to Y.

4. Query for the business component currently used in your UI view and search for the TNT SHM Update Opty Rev - Disable user property.
5. In the business component, change the value of the TNT SHM Update Opty Rev - Disable user property to Y.
6. Compile the SRF file used by your Siebel application.

For more information about changing the values of objects in Siebel Tools, see the chapter on working with objects in *Using Siebel Tools* .

Generating Quotes for All Opportunity Properties

When you generate quotes for the properties of an opportunity, then by default, Siebel Hospitality only generates quotes for the properties that are selected. However, you can disable this limitation so that quotes are generated for all properties associated with the opportunity, selected or not.

When quotes are generated for the properties of an opportunity, whether quotes are generated for selected properties or for all properties is controlled by the value of the TNT SHM Multiple Dates Selected Records user property. The possible TNT SHM Multiple Dates Selected Records user property values are as follows:

- **Y (default).** Generates quotes only for selected properties.
- **N.** Generates quotes for all associated properties regardless of selection status.

To generate quotes for all properties of an opportunity, whether selected or not, follow this procedure.

This task is a step in *Process of Configuring Opportunities and Quotes*.

To generate quotes for all opportunity properties

1. Start Siebel Tools.
2. Query for the TNT SHM Visual Quote Service business service and search for the TNT SHM Multiple Dates Selected Records user property.
3. In the business service, change the value of the TNT SHM Multiple Dates Selected Records user property to N.
4. Compile the SRF file used by your Siebel application.

For more information about generating quotes from opportunities, see *Generating Quotes from Opportunities*. For more information about changing the values of objects in Siebel Tools, see the chapter on working with objects in *Using Siebel Tools* .

Disabling Date Synchronization

In certain views that have more than one applet displaying a date range, the following behaviors occur:

- The date range is controlled by the uppermost applet that has a date range. When the start date of the upper applet changes, the first date of the lower applet changes to be in sync, when the start date is changed by the following user actions:
  - Entering a start date and then clicking Go or Search
  - Using the arrow buttons in the upper part of the applet

  An exception to this behavior occurs if the upper applet has a horizontal bar and if that bar is moved. In this case, the dates in the lower applet do not change.

- When the date range on the lower applets is changed, the date range of the upper applet is *not* affected.

To allow the flexibility to configure Siebel Hospitality to the business model of your company, you can disable these behaviors, either in all views at once or in selected views.

This topic addresses the following subjects:

- *Disabling Date Synchronization in All Views*
- *Disabling Date Synchronization in Selected Views*

This task is a step in *Roadmap for Setting Up Siebel Hospitality*.

Related Topics

Reviewing Total, Group, and Transient Availability

Reviewing Group Projected and Blocked Availability

Function Space Diary Total Availability View

Disabling Date Synchronization in All Views

By default, date synchronization is enabled. The ACR575 - GRC system preference variable allows you to disable this functionality in all applicable views at once. The possible values of this user property are as follows:

- **Y.** Default setting. Enables date synchronization.
- **N.** Disables date synchronization.

To disable date synchronization, follow this procedure.

To disable date synchronization in all views

- Set the ACR575 - GRC system preference to N.

For information about changing system preferences, see the chapter on ongoing administration tasks in *Siebel Applications Administration Guide* .

Disabling Date Synchronization in Selected Views

If the ACR575 - GRC system preference is set to Y, then date synchronization is enabled in all applicable views. If you want date synchronization enabled in some but not all applicable views, then you can disable this functionality in one or more specific views.

To disable date synchronization in selected views

1. Start your Siebel application and verify that the ACR575 - GRC system preference is set to Y.

   For information about determining the settings of system preferences, see the chapter on ongoing administration tasks in *Siebel Applications Administration Guide* .
2. Start Siebel Tools.
3. Query for the business component for the UI view in which you want to disable date synchronization.

   Views with date synchronization and their business components are shown in the following table.

Screen	View	Business Component
Property	Total Availability	TNT SHM SR Total Avail Dync
Property	Group Projected / Blocked	TNT SHM Property Projected/Blocked
Function Space Diary	Total Availability	TNT SHM Gantt AX Date Time Interval PopUp VBC

4. In the business component, search for the GRC View:(UI ViewName) user property.
5. Change the value of the GRC View:(UI ViewName) user property to FALSE.
6. Compile the SRF file used by your Siebel application.

For more information about changing the values of objects in Siebel Tools, see the chapter on working with objects in *Using Siebel Tools* .

4 Setting Up Properties

Setting Up Properties

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

- *About Hospitality Properties*
- *Roadmap for Setting Up Hospitality Properties*
- *Process of Adding Property Floor Plans*
- *Process of Setting Up Property Clusters*

About Hospitality Properties

A *property* is the location at which an event takes place. For example, a property might be a hotel where a customer has a number of rooms booked, or where a customer wants to hold a function. You can use Hospitality properties to store details about the layout, policies, neighborhood, and so on, of your property.

By profiling a property and the details of that property, including sleeping room and function space availability, you allow the property to be selected as a possible location for opportunities with customers. When opportunities progress, the properties that meet customer requirements can be presented to the customer in quotes.

Roadmap for Setting Up Hospitality Properties

This topic lists the procedures and processes that administrators typically perform to set up properties using Siebel Hospitality. Your company might follow a different process according to its business requirements.

> **Note:** This process is carried out as much as possible for nonparticipating properties (NPPs). That is, you must use all information available to you about NPPs to build the profiles of NPPs. For more information about NPPs, see *Setting Up Nonparticipating Properties*.

To set up Hospitality properties, perform the following processes and tasks:

1. *Creating Addresses for Properties*
2. *Setting Up Guest Conveniences*
3. *Adding Property Records*
4. *Setting Up Nonparticipating Properties*
5. *Defining Property Facilities and Room Services*
6. *Defining Property Day Parts*
7. *Assigning the Property Team*
8. *Defining the Neighborhood Characteristics of a Property*
9. *Defining the Property Profile*

10. *Defining Property Policies*
11. *Creating Sell Notes for a Property*
12. *Viewing the Property Calendar*
13. *Process of Adding Property Floor Plans*
14. *Process of Setting Up Property Clusters*

Creating Addresses for Properties

Before creating a property record, you must define an address for the property.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To create an address for a property

1. Navigate to the Administration - Data screen, then the Zip Code Administration view.
2. In the Zip Code Administration list, enter valid data for all ZIP Codes.

   If you do not have valid data for ZIP Codes, you will not be able to associate an address with a property. For more information about administering ZIP Codes, see *Siebel Applications Administration Guide* .
3. Navigate to the Administration - Data screen, then the Addresses view.
4. In the Addresses list, create an address record for each property, complete the fields, and save the record.

Setting Up Guest Conveniences

Guest conveniences are amenities that are in close proximity to the property, and that might be useful to guests during their stay at the property. Guest conveniences can include local airports, restaurants, booking centers, attractions, and other local companies.

Before guest conveniences can be associated with a property record, you must add the guest conveniences to the Siebel Hospitality database. The following procedure details how to set up guest conveniences in Siebel Hospitality.

For more information about associating guest conveniences with a property record, see *Defining the Neighborhood Characteristics of a Property*.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To set up guest conveniences

1. Navigate to the Guest Conveniences Administration screen, then the Guest Conveniences view.
2. In the Guest Conveniences list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Name	Name of the guest convenience.
Type	Type of convenience, either Airport, Booking Center, Restaurants, Local Companies, or Attractions.

Field	Comments
Address1	Street address of the guest convenience.
Address2	Remainder of the street address of the guest convenience.
City	Name of the city in which the guest convenience is located.
State	Name of the state in which the guest convenience is located.
Zip/Postal Code	ZIP or postal code of the guest convenience.
Country	Name of the country in which the guest convenience is located.
Description	Description of the guest convenience.
Driving Directions	Driving directions from the property to the guest convenience.

Adding Property Records

After creating airports, booking centers, and addresses, you can add property records.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To add a property record

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, create a record, complete the required fields, and save the record.
3. Click the show more button to view more fields.

   The following table describes some of the fields.

Field	Comments
# of Guest Rooms	The number of guest rooms at the property.
# of Meeting Rooms	The number of meeting rooms at the property.
AAA Diamond	The AAA Diamond rating of the property. AAA Diamond is an industry-recognized rating system for lodging products.

Field	Comments
Airport Shuttle Service	Indicates whether or not there is a shuttle bus from the property to the airport.
Airports	Select one or more airports from a predefined list. Airports are defined in the Guest Conveniences Administration screen. For more information about adding airports, see *Setting Up Guest Conveniences*.
Alternate Transportation	Specify one or more alternate means of transport to and from the property. For the alternative transport, you must enter the following information: o Mode of transport o Description of the alternate transport o The fee for the transport o Whether or not the customer must reserve the transport prior to use
Area UOM	The unit of measure to use for the property area (square feet or square meters).
Booking Centers	The reservation booking centers associated with a property. Booking centers are defined in the Guest Conveniences Administration screen. For more information about adding airports, see *Setting Up Guest Conveniences*.
Brand	The corporate brand of the property.
Bus Parking	Indicates whether or not parking for buses is available at the property.
CRS Code	The Central Reservation System code of the property.
Currency	The currency used by the property.
Description	A description of the property.
Downtown Distance	The distance in kilometers to the nearest retail center.
Driving Directions	Instructions on how to drive to the property.
Execution System	The event management system that is installed at the property.

Field	Comments
Largest Space	The name of the meeting room at the property with the largest physical area.
Main Fax #	The main fax number at the property.
Main Phone #	The main phone number at the property.
Market Tier	Classification of the property, which depends on the type of customer that the property caters to. Examples are: o Luxury o Quality o Moderate o Economy o Extended Stay
Mobil Star	The Mobil Star rating of the property. Mobil Star is an industry-recognized rating system for lodging products.
Nearest Airport	Select the nearest airport from a predefined list. To select an airport in this field, you must first add airports to the Airports field.
Nearest Airport Distance	This value is automatically calculated from the selection in the Nearest Airport field.
Nearest Major City	The major city nearest to the property.
Nearest Major Highway	The major highway nearest to the property.
Neighborhood Location	Select the value that generally describes the neighborhood; for example, urban, suburban, or rural.
Non-Participating	Indicates that the property is considered nonparticipating. In this case, availability and pricing checks are not performed for the property.
Opening Date	The date the property opened (or is expected to open) for business.
Pre-Open	Indicates that the property is not yet open, but event sales are underway for future dates.

Field	Comments
Price List	The price list associated with this property. This price list becomes the default price list for events held at the property, and is automatically associated with any orders and quotes created for the events. For more information about price lists, see *Siebel Pricing Administration Guide* .
Property	The property name.
Property Team	The team assigned to this property location. By default, the primary team member is the user who creates the property record. For more information about property teams, see *Assigning the Property Team*.
Property Type	The type of property; for example, Resort, Extended Stay, Meeting/Convention, or Corporate/Transient (the default).
Service Level	The service level of the hotel; for example, Extended Stay, Full Service, or Limited Service.
Shuttle to Downtown	Indicates whether or not there is a shuttle bus from the property to the downtown area.
Time Zone	The time zone in which the property is located.
Total Floors	The total number of floors in the property.
Web Address	The Web site address (URL) for the property.
Weekend-Weekday	This field is used for weekend-weekday pricing purposes. Indicates whether or not weekend rates will be used.
Year Built	The year in which the property was constructed.

Setting Up Nonparticipating Properties

Nonparticipating properties (NPPs) are properties that do not use the Hospitality Event Sales Execution, Central Reservation System, or Function Space Inventory processes. However, events for these properties might be sold by a

member of the property brand and the National Sales Organization (NSO). Event Booking Centers (EBCs) sell space from and pass event opportunities to NPPs.

For more information about nonparticipating properties, see *Managing Nonparticipating Properties*.

The following procedure describes how to create nonparticipating property records.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To set up a nonparticipating property

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, create a record, and select the Non-Participating field.
3. Complete the remaining fields, and save the record.

   For more information about the fields in the Properties list, see *Adding Property Records*.
4. After you have flagged this property as a nonparticipating property, it is recommended that you create one sleeping room for the property and map the sleeping room to a generic room block.

   For more information about creating sleeping rooms, see *Creating Sleeping Room Records*. For more information about mapping a sleeping room to a generic room block, see *Mapping a Generic Room Type to Property-Specific Room Types*.
5. It is recommended that you create one function space for the property.

   For more information about creating function spaces, see *Roadmap for Setting Up Function Spaces, Sleeping Rooms, and Suites*.

Defining Property Facilities and Room Services

After defining a property, you can specify the facilities and room service attributes of the property.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To define property facilities and room services

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property name field, and then click the Facilities view tab.
4. In the Facilities form, select the check boxes for each amenity at the facility.
5. Click the Room Services view tab.
6. In the Room Services form, select the check boxes for each room service amenity at the property.

Defining Property Day Parts

After defining a property, you define the day parts for the property by segmenting the operational day into smaller periods of time.

This topic includes the following topics:

- *Setting Up Day Parts*

- *Validating Day Parts*

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

Setting Up Day Parts

To set up day parts, follow this procedure.

> **Note:** Day parts can span two different days. For example, a day part might run from 10 P.M. until 3 A.M. However, day parts can span only one 24-hour time period.

To set up day parts

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property Name field, and then click the Day Parts view tab.
4. In the Day Parts list, create new records, complete the fields for each record, and save the records.

   The following table describes some of the fields.

Field	Comments
Day Part Name	The name of the day part, for example, Morning.
Start Time	The start time of the day part, for example, 6 A.M.
End Time	The time that the day part ends, for example, 12 P.M.
Include in Full Day Threshold	This check box is used to indicate whether the day part will be a part of the Full Day Threshold for discounts. o If selected, no function can qualify for a full day discount unless the function touches this day part. o If cleared, functions can qualify for a full day discount without touching this day part.
Comments	Add any relevant comments about the day part.

Validating Day Parts

To validate the day parts for a property, follow this procedure.

To validate day parts

1. Navigate to the Property Administration screen, then the Properties view.
2. In the properties list, select the required property, and click the link in the Property Name field.
3. Click the Day Parts view tab.
4. Select the first day part in the list, and click Validate.

- If there are any gaps or overlaps between the day parts, a dialog box appears prompting you to recheck the day part definitions.
- If the day parts are validated, the last day part in the list is selected after the validation.

Assigning the Property Team

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

This topic includes the following topics:

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

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

Assigning an Employee to a Property Team

To assign an employee to a property team, follow this procedure.

To assign an employee to a property team

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field, and then click the More Info view tab.
4. In the More Info view, click the show more button, and scroll to the Detailed Specifications section of the More Info form.
5. In the Property Team field, click the multiple select button.
6. In the Property Team Members dialog box, query for and add each team member.
7. In the Selected list, select the Primary check box in the primary team member record, and then click OK.

Removing an Employee from a Property Team

To remove an employee from a property team, follow this procedure.

To remove an employee from a property team

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the property Name field, and then click the More Info view tab.
4. In the More Info view, click the show more button, and scroll to the Detailed Specifications section of the More Info form.
5. In the Property Team field, click the multiple select button.
6. In the Property Team Members dialog box, in the Selected list, select the team member to be removed.
7. Click Remove, and then click OK.

   Repeat the last two steps of this procedure for each member you remove.

Defining the Neighborhood Characteristics of a Property

By defining a property neighborhood, you can give sales representatives a description of features of the location surrounding the property. This description can help sales representatives to develop opportunities with customers.

Note: For information about adding neighborhood features to Siebel Hospitality, see *Setting Up Guest Conveniences*.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To define the neighborhood characteristics of a property

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field.
4. Click the Neighborhood view tab.
5. In each of the lists on the Neighborhood view, add the appropriate new records.
   The lists that appear in the Neighborhood view of the user property are described in the following table.

List Applet	Comment
Competitors	Competitors of the property, that is, other properties with which your property might be in competition. You can select any property defined in Siebel Hospitality.
Key Local Companies	Important companies in the area.
Area Restaurants	Restaurants in close proximity to the property.
Other Attractions	Other attractions that might be of interest to customers.

6. In each of the lists, add the appropriate records.
7. Select a record from the picklist to associate with the property, and click OK, or create a new record.

Defining the Property Profile

You can use the property profile to capture details for a property, such as occupancy information, ownership, renovation information, credit cards accepted, and season information.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To define the property profile

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property record.

3. Drill down on the Property Name hyperlink.
4. Click the Profile view tab.
5. In the Profile form, complete the fields, as required.

   The following table describes some of the fields.

Field	Comments
Franchised By	The person or group that has franchised the property.
Last Common Area Renovation	Most recent year that the common room was renovated.
Last Room Renovation	Most recent year that the guest rooms were renovated.
Managed By	The person or group that manages the property.
Owned By	The person or group that owns the property.
Total Doubles	Total number of guest rooms that have double beds.
Total Floors	Total number of floors at the property.
Total Kings	Total number of guest rooms that have king-size beds.
Total Non Smoking	Total number of nonsmoking guest rooms at the property.
Total Queens	Total number of guest rooms that have queen-size beds.
Total Suites	Total number of suites at the property.
Renovation Description	A description of the last renovation at the property.

6. In the Credit Card list, create records for the credit cards that are accepted for payment by the property.
7. In the Seasons list, create records for the Peak Season and Off Peak season, specifying the start and end dates for these seasons.

Defining Property Policies

Defining property policies helps sales representatives to provide details to customers, such as check-in and check-out information, cancellation information, oversold information, and so on.

The policy lists that can be used to define policies are as follows:

- **Oversold policies**. Define what a sales representative must do when a room or function space has been oversold.
- **General policies**. Define policies other than oversold information. This includes cross-selling policies, cancellation information, and so on.

Note: Property policy records are for information only and do not control any other functionality in Siebel Hospitality.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To define property policies

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. Drill down on the Property Name hyperlink.
4. Click the Policies view tab.
5. In the Policies form, complete the fields.

   Some of the fields are described in the following table.

Field	Comments
Check In	The time that guests can check in at the front desk.
Check Out	The time that guests must vacate their rooms on the day of departure so that housekeeping can clean the room for future arrivals.
Incoming Fax Charges	The charges levied on incoming faxes to the hotel.
Local Phone Charges	The charges levied for local phone calls from the hotel.
Outgoing Fax Charges	The charges levied on outgoing faxes from the hotel.
Parking Fee	The fee levied for parking at the hotel.
Sales Parameter	Records the sales strategy for different types of bookings. These parameters act as guidelines for the types and sizes of rooms, and how these rooms are sold.

Field	Comments
Valet Parking Fee	The fee levied for valet parking at the hotel.

6. In the Oversold Check list, create a new record, and add a new oversold policy and a description for the property.

   Oversold policies are described in the following table.

Policy	Comment
Arrange Accommodation	The property arranges accommodation for the guest whose room is oversold.
Pay For One Night Room/Tax	The property pays for a room and pays the room tax for one night at an alternate location for the guest whose room is oversold.
Provide Transportation	The property provides transportation to an alternate property for the guest whose room is oversold.
Provide One Phone Call	The property provides one phone call to the guest whose room is oversold.
Direct Billing Can Be Arranged	The property can provide direct billing facilities to the guest whose room is oversold.

7. In the Policies list, create a new record, and add a new general policy and a description for the policy.

   The general policies are shown in the following table.

Policy	Comment
Business Mix	Details the historical mix of businesses for this property, for example, whether the property is generally used by local businesses or group businesses.
Opportunity Policies	Provides general details for managing opportunities at this property, for example, complimentary rooms provided, director's approval, and so on.
Sleeping Room Policies	Details general rules for upgrades at the property.
Special Property Policies	Provides information on rules that are out-of-the-ordinary, for example, smoking in meeting rooms, no pets allowed, and so on.
Cancellation Policy	Details how room cancellations are handled.

Policy	Comment
Cross Selling Policy	Provides information on how to cross-sell other properties to customers if a function space is not available at this property.
Future Year Booking Policy	Details the percentage increase in quotes for the year to come.

Creating Sell Notes for a Property

Sales managers can add *sell notes*, which describe the sales strategy to implement at the property. More than one sell note can be entered for any given date. Sell notes appear in the Special Dates calendar. For more information about the Special Dates calendar, see *Viewing the Property Calendar*.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To create sell notes for a property

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. Drill down on the Property Name hyperlink.
4. From the Property form, click the Sell Notes view tab.
5. In the Sell Notes list, create a record, and complete the fields.

   The following table describes some of the fields.

Field	Comments
Start Date	Start date of the sell note.
End Date	End date of the sell note.
Type	Designates the record type. The default value is Sell Notes, and only records of this type are displayed in this view.
Description	Description of the sell note.
Created By	The login of the person creating the sell note record.
Created Date	The date the sell note record was created.

Field	Comments
Last Updated By	The login of the person who last updated the sell note record.
Updated Date	The date the sell note record was updated.

Note: You can also set up special dates in the Sell Notes view. For more information, see *Setting Up Special Dates*.

Viewing the Property Calendar

The Property calendar shows quotes, special dates, and sell notes for a property. Users can view information in weekly and monthly formats, navigate to a different date, and print the calendar.

This task is a step in *Roadmap for Setting Up Hospitality Properties*.

To view the Property calendar

1. Navigate to the Property screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. Drill down on the Property Name hyperlink.
4. Click the Property Calendar view tab.

Process of Adding Property Floor Plans

You can attach floor plans for each property or part of the property to the property record. The ability to view floor plans allows sales representatives to make informed decisions about the suitability of a function space for a particular function.

To add property floor plans, perform the following tasks:

1. *Attaching a Floor Plan to a Property*
2. *Allowing Floor Plan Viewing from the Function Space Diary*
3. *Configuring the Floor Plan Website Option*

This process is a step in *Roadmap for Setting Up Hospitality Properties*.

Attaching a Floor Plan to a Property

To attach a floor plan to a property, follow this procedure.

This task is a step in *Process of Adding Property Floor Plans*.

To attach a floor plan to a property

1. Navigate to the Property Administration screen, then the Properties view.

2. In the Properties list, query for the required property record.
3. Drill down on the Property Name hyperlink.
4. Click the Floor Plans view tab.
5. In the Floor Plan list, create a new record, and complete the fields.

   The following table describes some of the fields.

Field	Comments
Name	Name of the floor plan for the function space.
Description	Description of the floor plan.
Image File Name	Floor plan image. Attach an image from the picklist. To attach a floor plan image that is not in the picklist, add a New Literature item of type Bitmap or Thumbnail Image. For more information about adding literature records, see *Siebel Applications Administration Guide* .
Image File Type	Type of the floor plan image, either Bitmap or Thumbnail Image.
Thumbnail Image File Name	Thumbnail image of the floor plan.
Thumbnail Image File Type	Type of the floor plan thumbnail image, either Bitmap or Thumbnail Image.

After you add a record to the Floor Plan list, sales representatives can view the floor plan in the Property screen, Floor Plans view for the property.

Allowing Floor Plan Viewing from the Function Space Diary

To allow users to view floor plans in the Function Space Diary, follow this procedure. For more information about how floor plans are used in the Function Space Diary, see *Viewing Floor Plans in the Function Space Diary*.

This task is a step in *Process of Adding Property Floor Plans*.

To allow floor plan viewing from the Function Space Diary

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property record.
3. Drill down on the Property Name hyperlink.
4. Click the Floor Plans view tab.
5. In the Floor Plans list, select a floor plan record.
6. In the Thumbnail Image File Name field, select the thumbnail graphic file for this floor plan.

After you select a graphic file in this field, the Thumbnail Floor Plan option (on the Function Space Diary view menu) is made available.

7. In the Image File Name field, select the graphic file for this floor plan.

   After you select a graphic file in this field, the Floor Plan button (on the Function Space Diary Property form) is made available.

Configuring the Floor Plan Website Option

The Function Space Diary also has a Floor Plan Website option. You must configure this option in Siebel Tools to make the option available to the users. For more information about configuring with Siebel Tools, see *Using Siebel Tools* .

This task is a step in *Process of Adding Property Floor Plans*.

To configure the Floor Plan Website option

1. In the Object Explorer, navigate to Applet.
2. Query for TNT SHM Site Entry Applet 1 Row.
3. Navigate to the Applet User Prop child object type.

   > **Note:** If you have not previously exposed the Applet User Prop child object type, then you must make it available using the pencil icon.

4. Query for the Main Url Field Applet User Prop.
5. Clear the Inactive check box to activate the applet user property.
6. Under Value, define the Web site to appear when the users select the Floor Plan Website option.
7. Deploy your changes to the Siebel Runtime Repository.
8. Restart the Siebel Hospitality application.
9. Verify that the Floor Plan Website option is available in the Function Space Diary.

Process of Setting Up Property Clusters

A *cluster* is a collection of individual properties that are grouped together for sales or revenue purposes. Properties can also be clustered if they are in close proximity to each other. Clustering can help with the sharing of assets between properties. A property can be associated with multiple clusters, depending on the purpose of each cluster.

Before completing this procedure, you must create property records to be included in the cluster, as described in *Adding Property Records*.

To set up property clusters, perform the following tasks:

1. *Creating a Property Cluster*
2. *Assigning Clusters to a User*
3. *Viewing Cluster Records*

This process is a step in *Roadmap for Setting Up Hospitality Properties*.

Creating a Property Cluster

The following procedure describes how to create a property cluster.

This task is a step in *Process of Setting Up Property Clusters*.

To create a property cluster

1. Navigate to the Clusters screen, then the Clusters view.
2. In the Clusters list, create a new record, and complete the fields.

   The following table describes some of the fields.

Field	Comments
Cluster Id	The identification number of the cluster. This field is automatically populated.
Description	A description of the purpose of the cluster.
Last Updated By	Read only. Automatically populated with the User Id of the last person to update this record.
Last Updated Date	Read only. Automatically populated with the date on which this record was last updated.
Name	The name of this cluster.
Type	The type of cluster, either Revenue Cluster or Sales Cluster.

3. Drill down on the Cluster Id hyperlink, and click the Properties tab.
4. In the Properties list, create a new record.
5. In the Add Properties dialog box, query for the property to add to this cluster, select the property, and click OK.

   Siebel Hospitality redisplays the Properties list with a new record. The fields in the list record display the details of the property you selected in the Add Properties dialog box.
6. Add more properties to the list as required.

Assigning Clusters to a User

Before a user can have access a cluster of properties, you must assign the cluster to that user. Users can have as many assigned clusters as necessary, and each cluster can be assigned to multiple users.

A sales representative can view records for all properties in an assigned cluster, even if that user does not have access to all of the properties in the cluster. This allows users to be aware of opportunities, quotes, orders, and so on, that are occurring in all properties in the cluster. It also allows resource clustering for products at other properties.

The following table describes the screen views for which cluster visibility is available. For each of these views, the sales representative is able to view all records associated with properties in the cluster.

Screen View	Cluster Information Displayed
Opportunity	Opportunities where the primary projected property of the opportunity is within the clusters to which the user is assigned.
Quotes	Quotes for all properties in the clusters to which the user is assigned.
Orders	Orders for all properties in the clusters to which the user is assigned.
Event Checks	Event checks for all properties in the clusters to which the user is assigned.
Functions	Functions for all properties in the clusters to which the user is assigned.
Room Blocks	Room blocks for all properties in the clusters to which the user is assigned.
Property	All properties in the clusters to which the user is assigned.
Property Pricing Admin	All properties in the clusters to which the user is assigned.
Evaluations	Evaluations of all properties in the clusters to which the user is assigned.
Turnover	Turnovers for all properties in the clusters to which the user is assigned.
Agreements	Agreements for all properties in the clusters to which the user is assigned.
Diary	Inventory for all properties in the clusters to which the user is assigned.
Sleeping Room Availability	Sleeping room inventory for all properties in the clusters to which the user is assigned.
Property Specific Event Templates	Property-specific event templates for all properties in the clusters to which the user is assigned.
Property Administration	All properties in the clusters to which the user is assigned.

This task is a step in *Process of Setting Up Property Clusters*.

To assign a cluster to a user

1. Navigate to the Administration - User screen, then the Employees view.
2. In the Employees list, query for the user to assign a cluster.
3. Scroll down to the Employee Details form.
4. In the Clusters field, select a cluster to assign to the employee.

The user now has access to the selected cluster. The user can view all records (described in the preceding table) associated with the properties in that user's clusters.

Viewing Cluster Records

If a property is in a cluster assigned to a user, that user has visibility to the records associated with the property, even if the user is not specifically assigned to that property. Records for the property, however, will only be available to that user in the Clusters visibility filter in the list of records, and not in any other visibility filter.

To view cluster records, follow this procedure.

This task is a step in *Process of Setting Up Property Clusters*.

To view cluster records

1. Navigate to the appropriate screen view, for example, the Quotes List view.
2. In the visibility filter for the list, click the drop-down arrow, and select the Clusters filter.

   The records associated with all properties in your clusters are displayed.

5 Setting Up Function Spaces, Sleeping Rooms, and Suites

Setting Up Function Spaces, Sleeping Rooms, and Suites

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

- *About Function Space Administration*
- *Roadmap for Setting Up Function Spaces, Sleeping Rooms, and Suites*
- *Process of Setting Up Function Spaces*
- *Process of Setting Up Sleeping Rooms*
- *Process of Setting Up Suites*

About Function Space Administration

Function spaces represent the physical areas within a property that are used for group events such as sales meetings, training sessions, weddings, and so on. Typical function spaces include meeting rooms, banquet rooms, ballrooms, the foyer, and other defined areas on the property grounds. Function space can have many characteristics, but during the booking process, the most important characteristics include the following:

- Setup style
- Minimum and maximum capacity for each setup style
- Physical area in square feet or square meters
- Usable area in square feet or square meters

Other characteristics of the function space (ceiling height, cable TV availability, and so on) can also be significant when considering whether or not a function must occupy a specific room to meet customer requirements.

Specific space represents the function rooms that are physically located at a property. A specific space usually has a name, for example, the Golden Gate Salon. There are two types of specific space, indivisible space and configured space.

Roadmap for Setting Up Function Spaces, Sleeping Rooms, and Suites

This topic lists the procedures and processes that administrators typically perform to set up function spaces, sleeping rooms, and suites using Siebel Hospitality. Your company might follow a different process according to its business requirements.

To set up Hospitality function spaces, sleeping rooms, and suites, perform the following processes:

- *Process of Setting Up Function Spaces*
- *Process of Setting Up Sleeping Rooms*
- *Process of Setting Up Suites*

Process of Setting Up Function Spaces

This topic lists the procedures that administrators typically perform to set up function spaces with Siebel Hospitality. Your company might follow a different process according to its business requirements.

To set up function spaces, perform the following tasks:

1. *Creating Indivisible Specific Spaces*
2. *Creating Configured Specific Spaces*
3. *Setting Up Function Space Categories for a Property*
4. *Marking a Space or Category as Requiring Backup*
5. *Associating Specific Spaces with a Function Space Category*
6. *Configuring the Do Not Move Flag*
7. *Defining Setup Style List Values*
8. *Associating Setup Styles and Packages with Properties*
9. *Associating Setup Styles with Function Space Categories*
10. *Optimizing Setup Styles for Specific Spaces*

This task is a step in *Roadmap for Setting Up Function Spaces, Sleeping Rooms, and Suites*.

Creating Indivisible Specific Spaces

An *indivisible space* is a function space that cannot be subdivided. Indivisible spaces are the basic components that a property offers for function space bookings. Examples are small salons, meeting rooms, and board rooms. Like any other function space, an indivisible space occupies a physical area and has capacity characteristics. Depending on the location in the property, indivisible space units can be grouped to form a larger, configured spaces.

This task is a step in *Process of Setting Up Function Spaces*.

To create an indivisible specific space

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property record.

3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, create a new record and complete the appropriate fields, as required.

   Some fields are described in the following table.

Field	Comments
Name	The name of the specific space.
Physical Area	The physical area of the specific space.
Backup Required	Indicates whether the specific space requires a backup function space. For more information about backup function spaces, see *Marking a Space or Category as Requiring Backup*.
Type	The product type. The default value is Indivisible. You can drill down on the Type field to define the features of the Type in the Product Key Features view.
Description	The description of the specific space.
Display Sequence	The sequence in which the function space appears in the Function Space Diary.
Compact Sequence	The sequence in which the function space appears in the Compact Diary view. For more information about the Compact Diary, see *Function Space Diary Views*.
Revenue Category	The revenue category associated with the specific space. This field is automatically populated with the Revenue Category value that is associated with the selected Revenue Sub Category. If specific spaces are not associated with revenue categories, then revenue rollup for the specific spaces does not occur.
Revenue Sub Category	The revenue subcategory associated with the specific space.
Revenue Parent Category	The revenue parent category associated with the specific space. This field is automatically populated with the Revenue Parent Category value that is associated with the selected Revenue Sub Category.
Usable Area	The default value is the value of the Physical Area field. Can be changed to be less than the Physical Area if necessary.
Effective Start Date	The date on which this space is available for use and the date on which this space is no longer available for use.

Field	Comments
Effective End Date	When effective start and end dates are defined for function spaces, these function spaces appear ineffective in the Function Space Diary on dates outside the effective period.
Floor Plan	An image of the floor plan for the specific space.
Special Location	Select to designate this function space as a special location. A Special Location designation is property-specific and user defined. When selected, indicates that the function space is not usually used as function space; or that the function space is used, sold, and so on only under special circumstances. For example, an indoor pool might be a special location because it is booked infrequently. As another example, consider an off-site location that is sold and serviced by a specific hotel. Company XYZ has a large meeting facility in its building. Hotel ABC regularly sells this meeting facility to customers and provides food services. However, to book this space, there might be special requirements, or Hotel ABC might want to note that the function space is off site.

Creating Configured Specific Spaces

A *configured space* is a grouping of indivisible space components. Examples are ballrooms, banquet rooms, and large salons. The components of a configured space must be physically contiguous, sharing at least one wall.

Before you can create configured space, you must create indivisible spaces as described in *Creating Indivisible Specific Spaces*.

This task is a step in *Process of Setting Up Function Spaces*.

To create a configured specific space

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, create a new record, and complete the fields as described in *Creating Indivisible Specific Spaces*.
5. In the Components list, perform the following steps:

    a. Click New.
    b. In the Add Components dialog box, select an indivisible space.
    c. Click OK.

    The specific space type remains Indivisible (the default), until you add components. After you add specific space components, the Type field value of the parent specific space record is automatically updated to Configured.

> **Note:** You cannot associate a specific space with itself. Also, a specific space can only be added once to a configured space. When you add a specific space as a component of a configured space, it is no longer available for selection in the Add Components dialog box.

6. Repeat Step 5 of this procedure to select additional components to the configured space.

   You must add at least two components for the space to be a configured space.

Setting Up Function Space Categories for a Property

A *function space category* is a group of specific spaces at a property with common characteristics, usually related to capacity. The groupings can consist of indivisible spaces and configured spaces. For example, you can define function space categories such as Small Meeting Room, Medium Meeting Room, and Large Meeting Room with corresponding specific spaces.

Setting up function space categories simplifies room bookings. During the booking process, customers typically do not care in which room a function is held, as long as sufficient capacity and square footage is guaranteed.

This task is a step in *Process of Setting Up Function Spaces*.

To create a function space category for a property

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, create a new record and complete the fields.

   The following table describes the fields.

Field	Comments
Name	The name of the function space category.
Backup Required	Indicates whether the category requires backup function spaces. For more information about backup function spaces, see *Marking a Space or Category as Requiring Backup*.
Physical Area	The physical area of the category.
Type	Read only. Specifies a value of Category or Suite. The default value is Category.
Revenue Category	The revenue category associated with the function space category. This field is automatically populated with the Revenue Category value that is associated with the selected Revenue Sub Category. If function space categories are not associated with revenue categories, then revenue rollup for the function spaces does not occur.

Field	Comments
Revenue Sub Category	The revenue subcategory associated with the function space category.
Revenue Parent Category	The revenue parent category associated with the function space category. This field is automatically populated with the Revenue Parent Category value that is associated with the selected Revenue Sub Category.
Compact Sequence	The sequence in which the category will appear in the Compact Diary view. For more information about the Compact Diary, see *Function Space Diary Views*.
Property Unit of Measure	Read only. Shows the unit of measure value specified for the property.
Effective Start Date Effective End Date	The date on which this category is available for use, and the date on which this category is no longer available for use. When effective start and end dates are defined for categories, these categories appear ineffective in the Function Space Diary on dates outside the effective period.

Marking a Space or Category as Requiring Backup

Some function spaces require a backup space in case the function space cannot be used when required. For example, a wedding party might request to have photographs taken in a garden, or might ask to use a beach attached to the hotel for a beach wedding. However, because these are outdoor events, they might be affected by weather conditions. In these cases, it might be necessary to indicate that the function space requires a backup space.

The backup space to be used instead of a specific space can be specified when a quote involving the specific space is generated. For more information about backup spaces, see *Managing Functions That Require Backup Space*.

You can mark individual specific spaces as requiring backup spaces, or you can mark all the spaces associated with a function space category as requiring backup spaces.

This topic contains the following topics:

- *Marking a Specific Space as Requiring Backup*
- *Marking a Function Space Category as Requiring Backup*

This task is a step in *Process of Setting Up Function Spaces*.

Marking a Specific Space as Requiring Backup

To mark a specific space as requiring backup, follow this procedure.

To mark a specific space as requiring backup

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, select the required specific space, and then select the Back Up Required field.

Marking a Function Space Category as Requiring Backup

To mark a function space category as requiring backup, follow this procedure.

To mark a function space category as requiring backup

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Categories list, select the required category, and then select the Back Up Required field.

Associating Specific Spaces with a Function Space Category

You can associate a specific space with one function space category.

This task is a step in *Process of Setting Up Function Spaces*.

To associate a specific space with a function space category

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, select the category.
5. Scroll down to the Specific Space view tab and create a new record.

   > **Note:** If the Back Up Required field of the category has been selected, then only those specific spaces whose Back Up Required fields are selected will be displayed.

6. Select the specific space record and click OK.

Configuring the Do Not Move Flag

When booking function spaces, users can specify that the function cannot be moved afterwards by other users (except administrators). For example, in the Quotes screen, Functions view, the Do Not Move Flag check box can be selected by users to restrict the movement of the function. For more information on using the Do Not Move Flag check box, see *Preventing Functions from Being Moved*.

The administrator can control the effects of users selecting the Do Not Move Flag check box by configuring the appropriate field in Siebel Tools. To configure the Do Not Move Flag check box, perform the steps in the following procedure.

This task is a step in *Process of Setting Up Function Spaces*.

To configure the Do Not Move Flag

1. Log in to Siebel Tools as an administrator.
2. Lock the TNT SHM Function project for editing.
3. In the Object Explorer, navigate to Business Component.
4. Query for TNT SHM Function.
5. From the Siebel Tools menu, choose Tools, Business Component, and then the Field menu item.
6. Query for Is Do Not Move Read Only.
7. Change the value for the Calculated Value field to Y.

   The default value for this field is N.

   Depending on the value you set for the Is Do Not Move Read Only field in Siebel Tools, selecting the Do Not Move Flag check box in Siebel Hospitality results in the behaviors described in *About the Do Not Move Flag Configuration Values*.
8. Compile your changes and replace the Siebel Repository File (.srf).
9. Restart the Siebel Hospitality application.

About the Do Not Move Flag Configuration Values

The TNT SHM Function business component contains a field named Is Do Not Move Read Only. To control the behaviors of the Do Not Move Flag check box in the Siebel Hospitality user interface, you can set the value of this field as described in *Configuring the Do Not Move Flag*. The behaviors of the Do Not Move Flag check box in Siebel Hospitality for the different values of Is Do Not Move Read Only are described in the following table.

Is Do Not Move Read Only setting	Do Not Move Flag behaviors
True (Y)	• Bookings with the Do Not Move Flag check box selected are read-only with respect to date, time, duration, and function space. • Only an administrator, or the user who originally selected the Do Not Move check box, can clear the check box and change the date, time, duration, and function space of the booking. • The ability to select and (without releasing the selection) then move bookings is disabled in the Function Space Diary for bookings with the Do Not Move Flag check box selected.
False (N)	• When users attempt to change the date, time, duration, or function space of a booking with the Do Not Move Flag check box selected, a confirmation dialog box appears. This dialog box warns that the record is marked as Do Not Move. If the user clicks OK to indicate that he or she still wants to move the booking, the Do Not Move Flag check box is cleared and, if the space and time are available, the booking is moved. • In the Function Space Diary, if the user tries to select and (without releasing the selection) then move any booking with the Do Not Move Flag check box selected, a message appears warning that the booking is marked as Do Not Move. If the user clicks OK to indicate that he or she still wants to move the booking, and if the space and time are available, the booking is moved. If the space or time cannot be reserved, a dialog box appears allowing the user to option, overbook, or cancel the move.

Defining Setup Style List Values

Before setup styles can be associated with a property, you must define setup styles in the List of Values (LOV) table. For more information about working with LOVs, see *Siebel Applications Administration Guide* .

This task is a step in *Process of Setting Up Function Spaces*.

To define setup style list values

1. Navigate to the Administration - Data screen, then the List of Values view.
2. In the List of Values list, query for records where the Type field value equals TNT_SHM_FSI_STYLE.
3. If the desired setup style has not yet been defined, perform the following steps.
    a. Click Clear Cache.
    b. Create a new record.
    c. Set the Type field to TNT_SHM_FSI_STYLE.
    d. Complete the other fields, as required.

Associating Setup Styles and Packages with Properties

You can associate predefined setup styles and packages with properties. For more information about creating property-specific menus and packages, see *Setting Up Property-Specific Menus and Packages* .

This task is a step in *Process of Setting Up Function Spaces*.

To associate a setup style and a package with a property

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Property Style view tab.
4. In the Property Style list, create a new record, and complete the fields as required.

    Some fields are described in the following table.

Field	Comments
Setup Style	Select a predefined setup style.
Display Name	Enter a name to be displayed for this setup style in the Siebel Hospitality user interface.
Package	Associate a property-specific or common product with the setup style. The product, which might be simple or customizable, must have a Product Type value of Setup Style.

Associating Setup Styles with Function Space Categories

You can associate setup styles with function space categories.

This task is a step in *Process of Setting Up Function Spaces*.

To associate a setup style with a function space category

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, select the category, and then scroll down and click the Setup Style view tab.
5. In the Setup Style list, create a new record and select a setup style to associate with this category.

   Note: If a setup style has an associated package, and that setup style is associated with the function space category, then the package is also associated with the function space category.

Optimizing Setup Styles for Specific Spaces

The setup styles associated with function space categories are automatically associated with the specific spaces that are included in these categories, if setup styles do not already exist. You can adjust the setup style information at the specific-space level to address the characteristics of a particular specific space.

This task is a step in *Process of Setting Up Function Spaces*.

To optimize a setup style for a specific space

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, select a record, and then scroll down and click the Setup Style view tab.
5. Update each setup style record as required.

Process of Setting Up Sleeping Rooms

You can define sleeping rooms for a property. One or more generic sleeping room types can be mapped to one or more property-specific sleeping room types. You can assign a percentage to each mapped property-specific sleeping room type to specify how many rooms of each type to reserve.

Additionally, one or more property-specific sleeping room types can be mapped to a run of house (ROH) sleeping room type. For more information about ROH sleeping rooms, see *About Run of House Room Types*.

For use case examples of sleeping room mapping, see *Scenarios for Mapping Sleeping Rooms*.

This topic lists the procedures that administrators typically perform to set up sleeping rooms with Siebel Hospitality. Your company might follow a different process according to its business requirements.

To set up sleeping rooms, perform the following tasks:

1. *Creating Sleeping Room Records*
2. *Mapping a Generic Room Type to Property-Specific Room Types*
3. *Mapping a Run of House Room Type to Property-Specific Room Types*
4. *Setting User Properties for Sleeping Room Mapping*

This task is a step in *Roadmap for Setting Up Function Spaces, Sleeping Rooms, and Suites*.

Creating Sleeping Room Records

To create sleeping room records, follow this procedure.

This task is a step in *Process of Setting Up Sleeping Rooms*.

To create sleeping room records

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Sleeping Rooms view tab.
4. To create a property-specific sleeping room record, click the Property Specific Sleeping Rooms link after the Sleeping Rooms view tab.
5. In the Sleeping Rooms list, create a record and complete the fields.

   Some fields are described in the following table.

Field	Comments
Capacity	The room capacity. The number of sleeping rooms of that type in the hotel. **Note:** If the Type field value is Sleeping Room or Suite, then Capacity is user-defined and is greater than or equal to 0. If the Type field value is ROH Sleeping Room, then Capacity is automatically set to 0, and you cannot enter a quantity greater than 0 in this field.
Description	A description of the sleeping room.
Name	A descriptive label for the sleeping room. Click the link in the Name field to navigate to the Product Administration screen, Products view.
Product Line	If defined, the product line associated with the sleeping room. Click the link in the Product Line field to navigate to the Product Administration screen, Product Lines view.
Room CRS Code	The Central Reservation System code for the sleeping room.
Type	The sleeping room type. Options are ROH Sleeping Room, Sleeping Room, and Suite.

Field	Comments
Effective Start Date	The date on which this sleeping room is available for use.
Effective End Date	The date on which this sleeping room is no longer available for use.
Revenue Sub Category	Select Sleeping Rooms, or select another revenue subcategory to associate with this sleeping room. Through the revenue subcategory, the sleeping room is associated with a charge code, which in turn is associated with taxes and service charges. For more information, see *About Hospitality Charge Codes, Taxes, and Service Charges*.
Revenue Parent Category	Read only. Parent revenue category for this sleeping room. Populated when you complete the Revenue Sub Category field. If you select Sleeping Rooms in the Revenue Sub Category field, then by default, this field displays Sleeping Rooms as the parent revenue category.
Revenue Category	Read only. Revenue category for this sleeping room. Populated when you complete the Revenue Sub Category field. If you select Sleeping Rooms in the Revenue Sub Category field, then by default, this field displays Sleeping Rooms as the revenue category.

Mapping a Generic Room Type to Property-Specific Room Types

After generic sleeping room types are created, you can map the property-specific room sleeping room types to the generic sleeping room types. This mapping facilitates the conversion of generic room block items during the create quote process. This procedure assumes that the appropriate room types for the property have already been created.

To map a generic sleeping room type to property-specific sleeping room types, follow this procedure.

This task is a step in *Process of Setting Up Sleeping Rooms*.

To map a generic room type to property-specific room types

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Sleeping Rooms view tab.
4. Click the Map Sleeping Rooms link.
5. In the Generic Sleeping Room list, select a generic sleeping room type.
6. In the Sleeping Room list, associate one or more property-specific sleeping room types with the selected generic sleeping room type.
7. In the property-specific sleeping room type record, enter a value in the Percentage to Sell field. This value specifies the percentage of each specific sleeping room type to reserve for a single generic sleeping room type.

   For example, suppose a generic sleeping room type named Generic Standard is mapped to two property-specific room types named Standard Smoking and Standard Non Smoking, with Percentage to Sell values of 25

percent and 75 percent, respectively. If a customer requests 100 Generic Standard sleeping rooms, the quote will reserve 25 rooms for Standard Smoking and 75 rooms for Standard Non Smoking.

> **Note:** If a generic sleeping room is mapped to multiple property-specific sleeping room types, the sum of the Percentage to Sell values must equal 100 percent. If a generic sleeping room is mapped to a single property-specific sleeping room type, the Percentage to Sell value must be 100 percent.

Mapping a Run of House Room Type to Property-Specific Room Types

After property-specific sleeping room types are created, you can map run of house (ROH) sleeping room types to other property-specific sleeping room types. This allows users flexibility in assigning rooms to groups with nonspecific room requirements. This procedure assumes that property-specific room types for the property, including ROH room types, have already been created.

A property can have multiple ROH room types. A property-specific room type can only be assigned to one ROH room type.

To map a run of house (ROH) sleeping room type to one or more property-specific sleeping room types, follow this procedure.

This task is a step in *Process of Setting Up Sleeping Rooms*.

To map a run of house room type to property-specific room types

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Sleeping Rooms view tab.
4. Click the Map ROH Rooms link.
5. In the ROH Sleeping Rooms list, select a run of house room type record.
6. In the Sleeping Rooms list, associate one or more property-specific sleeping rooms with the selected ROH room.

> **Note:** You can only associate a property-specific room type with one ROH room type.

Setting User Properties for Sleeping Room Mapping

You can set user properties to modify or enhance the Sleeping Room Mapping views in Siebel Hospitality. For more information about these user properties, see *User Properties for Sleeping Room Mapping*.

This task is a step in *Process of Setting Up Sleeping Rooms*.

Scenarios for Mapping Sleeping Rooms

This topic gives the following examples of how sleeping room mapping might be used. You might use sleeping room mapping differently, depending on your business model.

This topic includes the following scenarios:

- *Mapping Each Property-Specific Room Type to One Generic Room Type*
- *Mapping a Property-Specific Room Type to Two Generic Room Types*

Mapping Each Property-Specific Room Type to One Generic Room Type

A hotel uses the mapping shown in the following table.

Generic Room Type	Property-Specific Room Type	Distribution Percentage
Generic Standard	King City View	75 percent
	Double City View	25 percent
Generic Deluxe	King Ocean View	50 percent
	Double Ocean View	50 percent

If a customer requests 50 Generic Standard rooms and 100 Standard Deluxe rooms, the mapping returns the quote as shown in the following table.

Property Specific Room Type	Distribution Percentage	Number of Rooms	Rounding, if Applicable
King City View	75 percent of 50 rooms	37.5	37
Double City View	25 percent of 50 rooms	12.5	13
King Ocean View	50 percent of 100 rooms	50	50
Double Ocean View	50 percent of 100 rooms	50	50

Mapping a Property-Specific Room Type to Two Generic Room Types

A different hotel uses the mapping shown in the following table.

Generic Room Type	Property Specific Room Type	Distribution Percentage
Generic Standard	King City View	75 percent

Generic Room Type	Property Specific Room Type	Distribution Percentage
	Double City View	25 percent
Generic Deluxe	Double City View	25 percent
	King Ocean View	25 percent
	Double Ocean View	50 percent

Notice that the Double City View room type has been mapped to both Generic Room types. If a customer requests 50 Generic Standard rooms and 100 Generic Deluxe rooms, the mapping returns the quote as shown in the following table.

Property Specific Room Type	Distribution Percentage	Number of Rooms	Rounding, if Applicable
King City View	75 percent of 50 rooms	37.5	37
Double City View	50 percent of 25 rooms	12.5	13
Double City View	25 percent of 100 rooms	25	25
King Ocean View	25 percent of 100 rooms	25	25
Double Ocean View	50 percent of 100 rooms	50	50

Because the Double City View room type is mapped to both the Generic Standard and Generic Deluxe room types, the distribution totals are combined. The quote displays one count for the combined room type, as shown in the following table.

Property Specific Room Type	Distribution Percentage	Number of Rooms	Rounding, if Applicable
King City View	75 percent of 50 rooms	37.5	37
Double City View	50 percent of 25 rooms plus 25 percent of 100 rooms	13 plus 25	38
King Ocean View	50 percent of 100 rooms	50	25
Double Ocean View	50 percent of 100 rooms	50	50

Process of Setting Up Suites

A *suite* in the hospitality industry is a type of sleeping room that can be used either as a sleeping room or as a function space. This topic lists the procedures that administrators typically perform to set up suites with Siebel Hospitality. Your company might follow a different process according to its business requirements.

To set up suites, perform the following tasks:

1. *Setting Up Indivisible Specific Space Suites*
2. *Setting Up Configured Specific Space Suites*
3. *Setting Up a Suite Category*
4. *Associating Suite Specific Spaces with a Category*
5. *Associating Setup Styles with Suite Categories*
6. *Setting Up Suite Administration*

This task is a step in *Roadmap for Setting Up Function Spaces, Sleeping Rooms, and Suites*.

Setting Up Indivisible Specific Space Suites

The process of creating indivisible specific space suites is similar to the process for setting up indivisible specific spaces.

This task is a step in *Process of Setting Up Suites*.

To set up an indivisible specific space suite

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field and then click the Specific Space view tab.
4. In the Specific Space list, create a new record and select the Suite check box.
5. Complete the other fields, as required.

   For more information about the fields on the Property Administration screen, Specific Space view, see *Creating Indivisible Specific Spaces*.

Setting Up Configured Specific Space Suites

The process of creating configured specific space suites is similar to the process for setting up configured specific spaces.

This task is a step in *Process of Setting Up Suites*.

To set up a configured specific space suite

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Specific Space view tab.
4. In the Specific Space list, create a new record and select the Suite check box.

5. Complete the other fields, as required.

   For more information about the fields on the Property Administration screen, Specific Space view, see *Creating Indivisible Specific Spaces*.
6. Scroll down to the Components list and add a new record.
7. In the Add Component dialog box, select an indivisible specific suite space and click OK.
8. Repeat steps 6 and 7 of this procedure to select additional components.

   For more information about adding components to a configured space, see *Creating Configured Specific Spaces*.

Setting Up a Suite Category

You can set up a category to group indivisible or configured specific space suites.

This task is a step in *Process of Setting Up Suites*.

To set up a suite category

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, create a new category, and set the value in the Type field to Suite.
5. Complete the other fields, as required.

   For more information about the fields on the Property Administration screen, Category view, see *Setting Up Function Space Categories for a Property*.

Associating Suite Specific Spaces with a Category

After creating the suite category, you can assign suite specific spaces to the category.

This task is a step in *Process of Setting Up Suites*.

To associate suite-specific spaces with a category

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field, and then click the Category view tab.
4. In the Category list, select the suites category, and then scroll down to the Specific Space view tab.
5. In the Specific Space list, create a new record and select a suite-specific space.

Associating Setup Styles with Suite Categories

Assigning setup styles to suite categories is performed in the same way as assigning setup styles to other function space records. For more information, see *Associating Setup Styles with Function Space Categories*.

This task is a step in *Process of Setting Up Suites*.

Setting Up Suite Administration

You can specify information for suites such as check-in times, check-out times, and revenue routing. Check-in and check-out information is used when booking suites as sleeping rooms.

This task is a step in *Process of Setting Up Suites*.

To set up suite administration

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. Click the link in the Property Name field, and then click the Suite Administration view tab.
4. In the Suite Administration form, complete the fields as required.

   The following table describes some of the fields.

Field	Comments
Check-in Time	The time when the guests can check in to the hotel when the suite is used as a sleeping room.
Check-out Time	The time when the guests have to check out of the hotel after sleeping in a suite.
Suite Room Rental	Select to count the suite rental as sleeping room revenue. Clear to count the suite rental as function space revenue.

6 Setting Up Products and Assets

Setting Up Products and Assets

This chapter describes the process of setting up products and assets in Siebel Hospitality. It includes the following topics:

- *About Product Administration in Siebel Hospitality*
- *Roadmap for Setting Up Products and Assets*
- *Process of Creating the Hospitality Revenue Category Hierarchy*
- *Process of Setting Up Hospitality Products*
- *Process of Creating Generic and Property-Specific Products*
- *Process of Adding Catalog Visibility to Hospitality Products*
- *Process of Managing Function Spaces, Sleeping Rooms, and Categories as Products*
- *Forecasting Product Consumption*
- *Process of Defining Hospitality Assets*

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

About Product Administration in Siebel Hospitality

In Siebel Hospitality, a *product* is an item, a group of items, a service, or a group of services that your organization provides during an event. Items might include tables, chairs, and so on. A service might, for example, be a task performed by an audiovisual technician. You can define Hospitality products and product details for use by event managers.

For more information about products, see *Siebel Product Administration Guide* .

Simple and Complex Products

You can set up the following types of products in Siebel Hospitality:

- **Simple Products.** Products that cannot be further broken up into smaller subproducts, for example, individual menu items such as seafood chowder or grilled scallop.
- **Complex products.** Products that can be broken up into subproducts. For example, menus and packages are set up as complex products. Equipment bundles are also set up as complex products. You can enter an audiovisual projector as the product and include subproducts such as extension cord, lens cap, and so on.

You can follow a simplified process to create menus and packages that are automatically associated with specific properties. For more information about defining property-specific menus and packages, see *Setting Up Property-Specific Menus and Packages*.

Revenue Categories

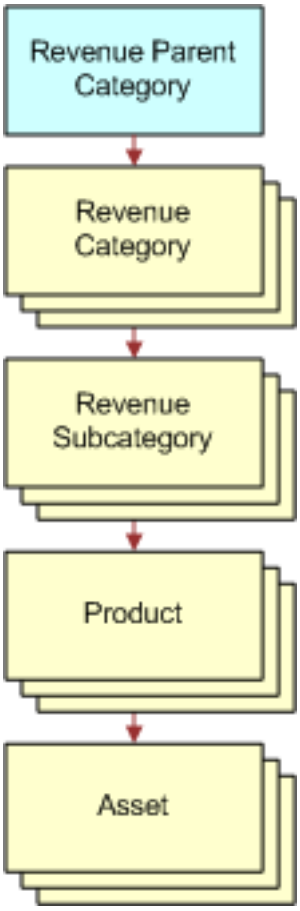
A product detail definition includes revenue types for reporting purposes and charge codes for tax, charge, and fee calculations.

Products are grouped into revenue parent categories, revenue categories, and revenue subcategories to help organize and administer them and for revenue rollup purposes. Function space revenues are associated with revenue parent categories for revenue rollup purposes.

Siebel Hospitality includes predefined revenue categories that can be used as revenue parent categories. Examples of predefined revenue categories include A/V, Banquet, Beverage, Billing, Food, Rental, Sleeping Room, and Special. The Special category allows users to group unique items for an event, such as fountains, paintings, signboards, and billboards.

The following image shows the relationship between a revenue parent category, a revenue category, a revenue subcategory, a product, and an asset. The relationship is as follows:

- For each revenue parent category, there can be multiple revenue categories.
- For each revenue category, there can be multiple revenue subcategories.
- For each revenue subcategory, there can be multiple products.
- For each product, there can be multiple assets.



Note: Revenue Category Administration within Siebel Hospitality is different from Category Administration in standard Siebel Business Applications. In Siebel Hospitality, products are categorized for revenue purposes. In a standard Siebel application, however, products are categorized for similarities, and revenue is not affected. For more information about standard product categories, see *Siebel Product Administration Guide* .

Roadmap for Setting Up Products and Assets

This topic lists the processes and procedures that administrators typically perform to set up products and assets in Siebel Hospitality. Your company might follow a different process according to its business requirements.

To set up Hospitality products and assets, perform the following processes and tasks:

1. *Process of Creating the Hospitality Revenue Category Hierarchy*
2. *Process of Setting Up Hospitality Products*
3. *Process of Creating Generic and Property-Specific Products*
4. *Process of Adding Catalog Visibility to Hospitality Products*
5. *Process of Managing Function Spaces, Sleeping Rooms, and Categories as Products*
6. *Forecasting Product Consumption*
7. *Process of Defining Hospitality Assets*

Process of Creating the Hospitality Revenue Category Hierarchy

To create revenue parent categories and subcategories in Siebel Hospitality, perform the following tasks:

1. *Creating a Revenue Parent Category*
2. *Creating a Revenue Category*
3. *Creating a Revenue Subcategory*
4. *Creating Notes for a Revenue Category*

This process is a step in *Roadmap for Setting Up Products and Assets*.

Creating a Revenue Parent Category

To create a revenue parent category, follow this procedure.

This task is a step in *Process of Creating the Hospitality Revenue Category Hierarchy*.

To create a revenue parent category

1. Navigate to the Revenue Category Administration screen, then the Category Admin List view.
2. In the Category Admin List view, create a new record and complete the fields.

   Some fields are described in the following table.

Field	Comments
BRS Report Flag	If selected, the revenue parent category and related revenue is displayed in the Banquet Revenue Summary report.
Description	A description of the revenue parent category.
Name	The name of the revenue parent category.
Sequence	The sequence in which the revenue parent category will show up in the list of categories.

Creating a Revenue Category

To create a revenue category, follow this procedure.

This task is a step in *Process of Creating the Hospitality Revenue Category Hierarchy*.

To create a revenue category

1. Navigate to the Revenue Category Administration screen, then the Category Admin List view.
2. In the Revenue Parent Category list, query for the revenue parent category for which you want to create a revenue category.
3. Drill down on the Name hyperlink.
4. In the Revenue Categories list, create a new record and complete the fields.

Creating a Revenue Subcategory

To create a revenue subcategory, follow this procedure.

This task is a step in *Process of Creating the Hospitality Revenue Category Hierarchy*.

To create a revenue subcategory

1. Navigate to the Revenue Category Administration screen, then the Category Admin List view.
2. In the Revenue Parent Category list, query for the revenue parent category for which to create a revenue subcategory.
3. Drill down on the Name hyperlink.
4. In the Revenue Categories list, select the revenue category for which to create a revenue subcategory.
5. Scroll down to the Sub Revenue Categories list, create a new record in the list, and complete the fields.

Creating Notes for a Revenue Category

To create notes for a revenue category, follow this procedure. Notes are displayed under the revenue category name in the BEO report. For more information about Hospitality reports, see *Managing Hospitality Reports*.

This task is a step in *Process of Creating the Hospitality Revenue Category Hierarchy*.

To create notes for a revenue category

1. Navigate to the Revenue Category Administration screen, then the Category Admin List view.
2. In the Revenue Parent Category list, query for the required parent category.
3. Drill down on the Name hyperlink.
4. In the Revenue Categories list, select the required revenue category.
5. Scroll down to the Sub Revenue Categories list, and click the Notes view tab.
6. Create a new record and complete the fields, as required.

   Some fields are described in the following table.

Field	Comments
Type	Select the note type.
Note	Enter the text of the note in the Note field.
Sequence	Automatically populated, editable. Determines the order in which the notes are printed in the Banquet Event Order (BEO) report.

Process of Setting Up Hospitality Products

You can follow a simplified process to create menus and packages, which are automatically associated with specific properties. For more information about defining property-specific menus and packages, see *Setting Up Property-Specific Menus and Packages*.

To set up simple and complex products in Siebel Hospitality, perform the following tasks:

1. *Creating Simple Hospitality Products*
2. *Creating Complex Hospitality Products*

This process is a step in *Roadmap for Setting Up Products and Assets*.

Creating Simple Hospitality Products

In Siebel Hospitality, a simple product is a single component product, such as table, chair, beverage, and so on. You can create simple products that can then be grouped to create complex products. For more information about creating products, see the chapter on basic product administration in Siebel Product Administration Guide.

This task is a step in *Process of Setting Up Hospitality Products*.

To create a simple Hospitality product

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, create a new product record, and complete the fields as required.

   Some fields are described in the following table.

Field	Comments
Name	The product name.
Part #	The part number for the product.
Type	The type of product. Examples are Menu, Package, Sleeping Room, and Setup Style.
Organization	Automatically populated with the name of the default organization. You can change the selection. You can add multiple organizations, specifying one as the primary.
Unit of Measure	The unit of measure used for the product. For example, if coffee is the product, the unit of measure might be pounds.
Revenue Subcategory	The revenue subcategory for the product.
Revenue Category	Automatically populated when a revenue subcategory is selected.
Parent Revenue Category	Automatically populated when a revenue subcategory is selected.
Resource Type	Determines whether or not the item is automatically reserved for an event. Available values are Critical, General, and Non-Critical. For more information about these values, see *About Hospitality Assets*.
Set-Up Time	Minutes necessary to set up a product.
Tear-Down Time	Minutes necessary to tear down a product.

Field	Comments
Property	The property at which this product is available.
Billable Flag	Select to charge the customer for use of the product. Clear to designate this product as free of charge. For example, you might charge customers for bottles of champagne, but you might not charge customers for the use of a table and chairs.
Grouping	Allows you to group products to facilitate searches for products, for example, to find all dinner main courses available at a particular property.
Report Header	Select a report header for the product.

3. Click Release to make the product take effect.

Creating Complex Hospitality Products

In Siebel Hospitality, a complex product is a group of simple products, such as a menu, a package, and so on. For example, a beverage is a simple product that can be part of a complex product such as a menu.

To create a complex product in Siebel Hospitality, you must first define simple products, and then add the simple products to the complex product as components. For more information about creating complex products for Siebel Hospitality events, see *Setting Up Property-Specific Menus and Packages*.

This task is a step in *Process of Setting Up Hospitality Products*.

Process of Creating Generic and Property-Specific Products

To create generic products and property-specific products in Siebel Hospitality, perform the following tasks:

1. *Creating Generic Room Blocks*
2. *Creating Generic Catering Products*
3. *Creating Property-Specific Products*
4. *Mapping Property-Specific Products to a Generic Catering Product*

This process is a step in *Roadmap for Setting Up Products and Assets*.

Creating Generic Room Blocks

To create generic room blocks, follow this procedure.

This task is a step in *Process of Creating Generic and Property-Specific Products*.

To create a generic room block

1. Create a room block product record, following the steps of *Creating Simple Hospitality Products*.
2. Select Generic Room Block in the Type field.

Creating Generic Catering Products

To create generic catering products, follow this procedure.

This task is a step in *Process of Creating Generic and Property-Specific Products*.

To create a generic catering product

1. Create a catering product record, following the steps of *Creating Simple Hospitality Products*.
2. Select Generic in the Type field.

Creating Property-Specific Products

To create property-specific products, follow this procedure.

This task is a step in *Process of Creating Generic and Property-Specific Products*.

To create a property-specific product

1. Follow the steps of *Creating Simple Hospitality Products*.
2. Select a property in the Property field.

Mapping Property-Specific Products to a Generic Catering Product

After creating a generic catering product, you must map property-specific products to the generic catering product. This facilitates the conversion of generic products during the create quote process.

Note: Generic catering products can also be selected as function line items for an opportunity.

This task is a step in *Process of Creating Generic and Property-Specific Products*.

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

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, query for the required generic catering product.
3. Drill down on the Name hyperlink.
4. Click the Specific Products view tab.
5. In the Specific Products list, create a new record and select the appropriate property-specific product.

Process of Adding Catalog Visibility to Hospitality Products

When simple and complex products have been created, you add catalog visibility to those products. Catalogs are different from revenue categories in that they allow you to group similar products together. These catalogs can then be assigned to groups of users to control who can access the products. By adding catalog visibility to products, you allow them to be accessed by different groups of people in your company.

You can further subdivide catalogs into product categories. For example, when creating a menu catalog, you might create different categories for starters and main courses.

When creating catalogs, you can also provide effective start and end dates for the categories associated with the catalog. For example, you might offer different menu options in winter than those available during the summer.

To add catalog visibility to Hospitality products, perform the following tasks:

1. *Creating a Product Catalog*
2. *Creating a Product Category*
3. *Adding Products to Catalogs and Categories*
4. *Adding Access Groups to Catalogs*
5. *Adding Access Groups to Categories*

This process is a step in *Roadmap for Setting Up Products and Assets*.

Creating a Product Catalog

To create a product catalog, follow this procedure.

This task is a step in *Process of Adding Catalog Visibility to Hospitality Products*.

To create a product catalog

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalog Administration list, create a new record and complete the fields.

   Some of the fields are described in the following table.

Field	Comments
Name	The name of the catalog.

Field	Comments
Description	A description of the catalog.
Effective Start Date	The date when the catalog becomes in effect.
Effective End Date	The date when the catalog is no longer in effect.
Private	Select to make the catalog visible only to users belonging to the access groups associated with the catalog. If the catalog is private, all the categories of the catalog are also private.
Active	When selected, indicates that the category is active.
Sequence	The sequence of this catalog in the list displayed to users.

Creating a Product Category

You can group products into product categories under catalogs. You can also create a hierarchy of categories and subcategories.

This task is a step in *Process of Adding Catalog Visibility to Hospitality Products*.

To create a product category

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalog Administration list, query for and select the required catalog.
3. Drill down on the Name hyperlink.

   The Categories view appears.
4. Create a new category record, and complete the fields as required.

   For information about the fields, see *Creating a Product Catalog*.

   > **CAUTION:** Make sure that you complete the Effective Start Date and Effective End Date fields. Siebel Hospitality checks these dates when users create quote line items for effective catalogs.

5. Create additional new product categories as needed.
6. (Optional) Build a hierarchy of category and subcategory records by performing the following steps:
   a. Click the Move up and Move down buttons to position a category under a primary category record.
   b. Click the Demote one level button once to indent the category under the primary category and make it a subcategory.

Adding Products to Catalogs and Categories

After you have created product catalogs and categories, you can add products to them.

This task is a step in *Process of Adding Catalog Visibility to Hospitality Products*.

To add products to catalogs and categories

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalog Administration list, query for and select the required catalog.
3. Drill down on the Name hyperlink, and select the required category in the Categories list.
4. Scroll down, click the Categories view tab, and then click the Products list.
5. In the Products list, create a new record.
6. In the Add Internal Products dialog box, query for and select the required product, and click OK.

   The selected product appears in the Products list. Most fields are populated when the product has been selected.
7. Add more products, as required.
8. (Optional) In the Sequence # fields, specify the sequence in which to display the products in the catalog.

Adding Access Groups to Catalogs

When you have added products to catalogs and categories, you can add access groups to a catalog to make the products in the catalog visible to the required groups of people. For more information about access groups and visibility, see *Siebel Applications Administration Guide* .

This task is a step in *Process of Adding Catalog Visibility to Hospitality Products*.

To add access groups to a catalog

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalog Administration list, query for and select the required catalog.
3. Drill down on the Name hyperlink, and then click the Access Groups view tab.
4. In the Access Groups list, create a new record.
5. In the Add Access Groups dialog box, query for and select the required access group, and click OK.

   The selected access group appears in the Access Groups list. Most fields are populated when the access group has been selected.

Adding Access Groups to Categories

When you have added products to catalogs and categories, you can add access groups to a category to make the products in that category visible to the required groups of people. For more information about access groups and visibility, see *Siebel Applications Administration Guide* .

This task is a step in *Process of Adding Catalog Visibility to Hospitality Products*.

To add access groups to a category

1. Navigate to the Administration - Catalog screen, then the Catalog Administration view.
2. In the Catalog Administration list, query for and select the required catalog.
3. Drill down on the Name hyperlink, and select the required category in the Categories list.
4. Click the Categories view tab, and then click the Access Groups link.
5. In the Access Groups list, create a new record.
6. In the Add Access Groups dialog box, query for and select the required access group, and click OK.

   The selected access group appears in the Access Groups list. Most fields are populated when the access group has been selected.

Process of Managing Function Spaces, Sleeping Rooms, and Categories as Products

Function spaces, sleeping rooms, and categories are created in the Property Administration screen. Subsequently, these function spaces, sleeping rooms, and categories are also displayed as products in the Administration - Product screen. When a new function space, sleeping room, or category record is defined in the Property Administration screen, a new product record is also created and released.

For more information on creating function space, sleeping room, and category products, see *Setting Up Function Spaces, Sleeping Rooms, and Suites*.

This task is a step in *Roadmap for Setting Up Products and Assets*.

To manage function spaces, sleeping rooms, and categories as products, perform the following tasks:

1. *Navigating to the Administration - Product Screen from the Property Administration Screen*
2. *Defining Product Attributes for Function Spaces, Categories, and Sleeping Rooms*
3. *Adding Product Attributes to Function Spaces, Categories, and Sleeping Rooms*
4. *Setting Up Function Space Product Features*
5. *Associating a Product Feature with a Function Space or Category*

This process is a step in *Roadmap for Setting Up Products and Assets*.

Navigating to the Administration - Product Screen from the Property Administration Screen

You can navigate to the Administration - Product screen from some Property Administration screen views.

This topic includes the following topics:

- *Navigating to the Administration - Product Screen from the Specific Space View*
- *Navigating to the Administration - Product Screen from the Category View*

This task is a step in *Process of Managing Function Spaces, Sleeping Rooms, and Categories as Products*.

Navigating to the Administration - Product Screen from the Specific Space View

To navigate to the Administration - Product screen from the Property Administration screen, Properties, Specific Space view, follow this procedure.

To navigate to the Administration - Product screen from the Specific Space view

1. Navigate to the Property Administration screen.
2. Drill down on the Property Name field of a property record.
3. Click the Specific Space view tab.
4. Drill down on the Name field of a specific space record.

   The Administration - Product screen, Products, More Info view appears.

Navigating to the Administration - Product Screen from the Category View

To navigate to the Administration - Product screen from the Property Administration screen, Properties, Category view, follow this procedure.

To navigate to the Administration - Product screen from the Category view

1. Navigate to the Property Administration screen.
2. Drill down on the Property Name field of a property record.
3. Click the Category view tab.
4. Drill down on the Name field of a category record.

   The Administration - Product screen, Products, More Info view appears.

Defining Product Attributes for Function Spaces, Categories, and Sleeping Rooms

Attributes are product characteristics that are defined for product classes. All products belonging to a class inherit the attributes associated with that class. Attributes must be inherited from the class to which the product belongs. Attributes must be defined, added to a class, released for version control, and then added to the appropriate products.

This task is a step in *Process of Managing Function Spaces, Sleeping Rooms, and Categories as Products*.

To define product attributes for function spaces, categories, and sleeping rooms

1. Navigate to the Administration - Product screen, then the Attribute Definitions view.
2. Create a new attribute record and select the Locked Flag check box.
3. In the Versions list, drill down on the Version field.
4. In the Domain Type field, select one of the following options:
   - **Enumerated**. Defines a list of values from which users must select when applying the attribute.

     After selecting this option, go to Step 5.
   - **Free Form**. Allows users to enter their own values for the attribute.

     After selecting this option, go to Step 6.
5. To define a list of values for the attribute, perform the following steps:

a. In the Attributes Values list, click New.
b. In the Value field, add the name for the value, for example, Street View, Ocean View, or Gardens View.
c. In the Sequence field, enter the order in which you want the value to appear in the list of options. For example, enter 1 to display the value at the start of the list.
d. Create additional attribute values, as needed.

6. In the Attribute Definitions list, query for the new record and click Release.
7. Click the Product Classes view tab.
8. Create a new class record and select the Locked Flag check box.
9. In the Versions list, drill down on the Version field.
10. Add the new attribute to the new class.

    If you defined a list of values for the attribute, the values you entered appear in the Default Value list in the sequence that you specified.
11. In the Product Classes list, query for the new record and click Release.

    You can now add the class and related attributes to a product.

Adding Product Attributes to Function Spaces, Categories, and Sleeping Rooms

You can use attributes with Hospitality products to control price adjustments. For example, you might charge lower rates for sleeping rooms that have a street view as opposed to an ocean view.

This task is a step in *Process of Managing Function Spaces, Sleeping Rooms, and Categories as Products*.

To add product attributes to function spaces, categories, and sleeping rooms

1. Navigate to the Administration - Product screen, then the Product Definitions view.
2. Query for a product to which to add the attribute.
3. Select the Locked Flag check box.
4. In the Product Class field, select the product class to which the attribute belongs.
5. Click Release to make the change to the product take effect.

   The product is now associated with the product class and inherits all the attributes of that class.

Setting Up Function Space Product Features

You can define features for function space product lines that a user can specify when entering the function agenda for an opportunity. The features specified for the function agenda are then used to select the most appropriate function space during the create quote best fit process. The create quote best fit process first examines categories to check whether the specified feature has been associated with a category. If the feature has not been associated with a category, the process then checks specific spaces.

For example, several function spaces at a property have the same Room Area, Setup Style, and Expected Attendees values. However, only one of the function spaces (Salon A) has a south-facing view. If South View is specified as a feature in the function agenda of an opportunity, the create quote best fit process will only return Salon A as the function space for the booking.

After creating a product feature, you must associate it with the appropriate categories or specific spaces so that the create quote best fit process can match the appropriate space to the booking.

This task is a step in *Process of Managing Function Spaces, Sleeping Rooms, and Categories as Products*.

To set up a function space product feature

1. Navigate to the Administration - Product screen, then the Product Features view.
2. In the Product Features list, add a new record.
3. In the Product Line field, select Function Space.
4. Navigate to the Opportunities screen, then the Function Agenda view.

   In the Feature field of the Function Agenda list, the function space features you added are displayed as options in the Function Space field.

Associating a Product Feature with a Function Space or Category

To associate a product feature with a function space or a category, follow this procedure.

This task is a step in *Process of Managing Function Spaces, Sleeping Rooms, and Categories as Products*.

To associate a product feature with a function space or category

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, query for a specific space or category.
3. Drill down on the Name field.
4. In the Product Key Features list, create a new record.
5. In the Feature field, select a product feature.

> **Note:** When defining the key features for a function space, you must select features with a Product Line value of Function Space, to make sure the space matches the function agenda feature requirements.

Forecasting Product Consumption

For most products, the quantity to be used at an event is usually the quantity of the product line item. If a quantity is entered for a line item, then the line item value is used to calculate revenue. However, for some products, the quantity to be used at an event, which is used to forecast revenue, is calculated from the number of attendees.

For more information about how product consumption forecasting can be applied, see *Example of Product Consumption Forecasting*.

This task is a step in *Roadmap for Setting Up Products and Assets*.

To forecast product consumption

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, create a new product record.
3. In the new record, complete the fields, as required.

Some fields are described in the following table.

Field	Comments
Forecast Qty	Select to enable product consumption forecasting. Clear to use the line item quantity to forecast the revenue for the item, instead of product consumption forecasting.
UoM	The unit of measure by which the product is sold.
Consumption UoM	The unit of measure for actual consumption by the attendees. For example, coffee might be sold by the gallon for a function, but the attendees might consume coffee by the cup.
UoM Conversion Factor	The ratio of Consumption UoM to Product UoM. For example, if there were 20 cups of coffee in 1 gallon of coffee, then the ratio is 20 to 1, and the conversion factor is 20.
Consumption Factor	The expected per-person consumption of the product. For example, if each attendee is expected to consume two cups of coffee, then the Consumption Factor is 2.
% Participation	The percentage of attendees who are expected to consume the product, expressed as a fraction of 1. For example, if 80 percent of attendees are expected to consume the product, then enter 0.8 to this field. **Note:** In some cases, the percentage participation might be different from property to property. For example, in colder states, people might drink hot coffee than in warmer states. In this case, it is necessary to create different products with different values in this field.

4. Click Release to make the product take effect.

Example of Product Consumption Forecasting

This topic gives one example of product consumption forecasting. You might use this feature differently, depending on your business model.

A customer requests coffee for an upcoming event at which 100 attendees are expected. You know from experience that approximately four out of five attendees drink an average of two cups of coffee at such an event. The price of coffee is 10.00 per gallon. From this information, the consumption quantity of the product can be forecast for this event. The amount of revenue expected from this product can also be estimated for this event.

Create a product representing the coffee in Siebel Hospitality, as shown in the procedure that follows.

To forecast product consumption for an event

1. Navigate to the Administration - Product screen, then the Products view.

2. In the Products list, create a new product record.
3. In the new record, complete the fields with the values shown in the following table.

Field	Value	Comments
Forecast Qty	Selected	Product consumption forecasting is enabled.
UoM	Gallon	None
Consumption UoM	Cup	None
UoM Conversion Factor	20	Each coffee-sized cup holds approximately 6 ounces.
Consumption Factor	2	Attendees who consume coffee are expected to consume two cups each, on average.
% Participation	0.8	80 percent of attendees are expected to drink coffee.

The forecasting calculations and results for the event are shown in the following table.

Forecast	Calculation	Result
Number of attendees consuming the product	100 multiplied by 0.8	80
Number of cups consumed	80 multiplied by 2	160
Number of gallons consumed	160 divided by 20	8
Revenue	8 multiplied by 10.00	80.00

Process of Defining Hospitality Assets

To define assets in Siebel Hospitality, perform the following tasks:

1. *Creating Hospitality Assets*
2. *Defining Asset Inventory Display in the Function Space Diary*

This process is a step in *Roadmap for Setting Up Products and Assets*.

Creating Hospitality Assets

An *asset* is a specific physical instance of a product. Users reserve assets, not products. An asset can be associated with a specific property, and multiple assets can be associated with a single product. You cannot create an asset unless a product for that asset is already defined.

For example, a product called Piano has the following assets:

- Yamaha Piano at New York property, Serial # 7896-0987
- Wurlitzer Piano at London property, Serial # Z765-9876

Additionally, you can create assets for menu items and event order items. These items are automatically associated with specific properties and can form components of property-specific menus and packages. For more information about defining property-specific assets, see *Creating Assets for Property-Specific Products*.

Optionally, you can apply preventive maintenance to an asset. For information about setting up and using preventive maintenance for an asset, see *Siebel Field Service Guide* .

This task is a step in *Process of Defining Hospitality Assets*.

To create a Hospitality asset

1. Navigate to the Assets screen, then the List view.
2. In the Assets list, create a new record and complete the fields, as required.
3. In the new record, click the Asset # hyperlink.

   The Assets Components view is displayed.
4. Click the More Info tab and complete the fields, as required.

   Some fields are described in the following table.

Field	Comments
Account	The account associated with this asset.
Asset #	A unique number used to track the asset.
Asset Tag	Identifier from the physical label on an asset.
Installed	Default value is the date the asset is entered.
Original Cost	The original cost of the asset.
Owner	The account to which the asset is assigned.
Ownership	The type of ownership. Options are Rented, Leased, Purchased, Financed, or Consigned.

Field	Comments
Part #	The part number of the asset. If a value exists in the Part # field of the associated product record, this field is automatically populated with that value.
Product	The product with which the asset is associated. **Note:** If the product is a property-specific product, then you must select the same property for this asset.
Property	The property at which the asset is located.
Serialized	Read only. Indicates whether or not the product is serialized.
Serial #	The serial number of the asset.
Status	Select Active or Available to make the asset available for use at a property.
Qty	Quantity specified for the asset. Default value is 1.

Defining Asset Inventory Display in the Function Space Diary

After you create asset records, you can define the method of display for the assets in the Function Space Diary. For more information, see *Defining Function Space and Asset Inventory Status Indicators*.

This task is a step in *Process of Defining Hospitality Assets*.

7 Setting Up Property-Specific Menus and Packages

Setting Up Property-Specific Menus and Packages

This chapter describes how to set up property-specific menus and packages. It includes the following topics:

- *About Menus and Packages Administration*
- *Roadmap for Setting Up Menus and Packages*
- *Associating a Default Catalog Category with a Property*
- *Process of Creating Property-Specific Products*
- *Process of Creating Property-Specific Menus*
- *Process of Creating Property-Specific Packages*
- *Sharing Property-Specific Products with Other Properties*
- *Process of Performing Ongoing Menus and Packages Administration*
- *Revenue Allocations for Menus and Packages*
- *Scenarios for System-Calculated Revenue Allocations*

About Menus and Packages Administration

You can set up simple and complex products that are available throughout Siebel Hospitality. This process is described in *Setting Up Products and Assets*. However, in Siebel Hospitality, you can also set up products that are specific to selected properties. This chapter describes how to set up menus and packages as property-specific products. By default, a menu or package created in this way is associated with one specific property.

In addition to creating menus and packages that are automatically associated with the property of your choice, the functionality described in this chapter offers a simplified way of creating menus and packages as complex products. To create a menu or package with the functionality described in this chapter, you first create the component simple product items. Then you create a menu or package record and assign items to it. Then you assign prices to the menu or package.

Menus and Packages Defined

A *menu* is a grouping of Food and Beverage (F&B) items that are sold together, which has one overall price. A menu can include *only* F&B items. A menu can be a fixed-price menu that costs the same regardless of items selected, or a variable-price menu that depends on the items selected. A variable-price menu can include alternate choices with different prices; for example, a salmon entree for 24.95 or a prime rib entree for 29.95. In this case, the price for each person varies depending on the individual selections.

A *package* is a grouping that can include any type of items, such as menus, individual F&B items, individual non-F&B items, BEO (Banquet Event Order) items, and other packages.

Both menus and packages are complex products. A menu is composed of multiple simple products, while a package is composed of multiple simple products and, possibly, other complex products as well. For more information about simple products and complex products, see *Process of Setting Up Hospitality Products*.

Menus and Packages Revenue Breakouts

Siebel Hospitality has views that break down revenue information in detail for accounting purposes, and other views that sum up revenue information for presentation to customers. Siebel Hospitality performs financial breakout calculations, including revenues, taxes, service charges, audio-visual (AV) rentals, sleeping room rentals, banquet room rentals, and so on, in the background. Siebel Hospitality then transmits these calculations to the various revenue buckets and tracking categories.

Guests do not see accounting line item details on their bills. However, if necessary, you can supply guests with this information. You can also track items to revenue categories and subcategories. For example, Liquor, Beer, and Wine subcategories are tracked to the Beverage category.

For more information about, and examples of, revenue breakouts for menus and packages, see *Revenue Allocations for Menus and Packages*.

Types of Menus and Packages

Several types of menus and packages exist. Each type defines how the menus or packages belonging to that type are priced.

- **Menu Per Person.** This menu type provides for one menu for each person. This type can be a *set menu*, which has a fixed price for each person. Alternatively, this type can be a *split menu*, which has a variable price for each person, depending on the items selected.
- **Package Per Person.** This package type provides a fixed price for each person where individual item prices are not broken out.
- **Package Each.** This package type provides a fixed price for a quantity of 1 of the package, regardless of the number of people.
- **Package Item Price.** This package type provides a variable price for each person where individual item prices are broken out.

Each menu and package type has pricing rules that are specific to that menu or package type. In the case of a Package Per Person, a Package Each, and a Menu Per Person that is a set menu, there is a set price for the parent product. A customer pays that set price regardless of which child products are included.

In the case of Package Item Price, however, the parent package does not have a set price. Pricing is based on the items in the package and how many of the items the customer orders. For example, the price of a cash bar that includes various beverages is based on the quantity of each child product that is ordered. Similarly, for a Menu Per Person that is a split menu, the price of the parent menu varies according to the items ordered. For example, a split menu might offer a choice of steak or chicken. Depending on the choice, this menu has two different prices.

Instances of Menu Types

This topic shows specific instances of different types of menus.

- **Menu per person, simple set menu.** A simple dinner menu might include the items listed in the following table. This menu has a per-person price of 21.95.

Quantity	Item
1	Salad
1	Dinner entree
1	Vegetable
1	Dessert

- **Menu per person, split menu.** A sit-down dinner menu might include the items listed in the following table. The per person price of this menu varies according which dinner entree each diner selects.

Quantity	Item Category	Items
Choice of 1	Salad	Cobb Salad
Choice of 1	Dinner entree	Roast Chicken
		Prime Rib
		Lamb Medallions
Choice of 1	Vegetable	Steamed Broccoli
Choice of 1	Dessert	Chocolate Cake

Instances of Package Types

This topic shows specific instances of different types of packages.

- **Package each.** A simple reception desk package might include the items listed in the following table. This package has a package price of 50.00.

Quantity	Item
1	8-foot table with skirting
3	Chairs
1	Waste basket
50	Name tags
3	Marker pens

- **Package per person.** A wedding reception package might include both per person items and static items, such as those listed in the following table. This package has a per person price of 45.00. If 10 people attend the event, then the package includes 10 menus and 1 each of the audiovisual equipment items. The price is 45.00 multiplied by 10, or 450.00.

Quantity	Item
150	Surf-and-Turf dinner menus per person
1	12-foot by 12-foot dance floor
1	DJ
6	Hours of music
2	Microphones

- **Package item price.** A cash bar package might include the items listed in the following table. The per person price of this package varies according to the numbers and types of items ordered from each category.

Quantity	Item Category	Items
Any	Soft drinks	Cola
		Orange soda
		Root beer
Any	Alcohol beverages	Beer
		Wine
		Cordials
Any	Caffeine beverages	Coffee
		Tea

Roadmap for Setting Up Menus and Packages

This topic lists the processes and procedures typically performed by administrators when setting up property-specific menus and packages. Your company might follow a different process according to its business requirements.

To set up property-specific menus and packages, perform the following processes and tasks:

1. *Associating a Default Catalog Category with a Property*
2. *Process of Creating Property-Specific Products*
3. *Process of Creating Property-Specific Menus*
4. *Process of Creating Property-Specific Packages*
5. *Sharing Property-Specific Products with Other Properties*
6. *Process of Performing Ongoing Menus and Packages Administration*

Associating a Default Catalog Category with a Property

As a requirement for creating property-specific products, you must associate a catalog category with the property. This category becomes the default catalog category for products associated with the property. When you create a property-specific product, Siebel Hospitality automatically assigns that product to the default catalog category of the property.

This task is a step in *Roadmap for Setting Up Menus and Packages*.

To associate a default catalog category with a property

1. Create a new property record or select an existing property record.

   For more information about setting up a property, see *Adding Property Records*.
2. Select a category in the Default Product Category field.

   The selected category becomes the product category for all products created for this property.

Process of Creating Property-Specific Products

Before constructing menus and packages, you must build the simple product items that are for sale at a selected property, and that can become part of a menu or a package.

To create property-specific products in Siebel Hospitality, perform the following tasks:

1. *Adding Products to a Property*
2. *Associating Prices with a Property-Specific Product*
3. *Creating Assets for Property-Specific Products*

This process is a step in *Roadmap for Setting Up Menus and Packages*.

Adding Products to a Property

To add product records to a selected property, follow this procedure.

> **Note:** Products must be released to make them visible to users. Siebel Hospitality releases a product automatically when you finish creating the product. For more information about releasing products, see the chapter on releasing products and other versioned objects in *Siebel Product Administration Guide* .

This task is a step in *Process of Creating Property-Specific Products*.

To add a product to a property

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property to which to add a product, and drill down on the Name field of the property record.
3. Click the Event Order/Menu Items view tab.
4. In the Event Order/Menu Items list, add a new record and complete the necessary fields.

   Some fields are described in the table that follows.

Field	Comments
Type	Picklist selections are as follows: ○ **Event Order Item.** Identifies a non-F&B-related product.

Field	Comments
	○ **Menu Item.** Identifies a F&B-related product.
Grouping	Identifies groups of related products. Allows you to associate this product with a product grouping. This enables users to construct searches for products on the groupings to which they belong. Available values can vary according to the selection in the Type field. Product groupings are user-defined and are specific to the business requirements of your company. For example, Ice Creams might be a grouping, helping users to find the ice creams that are stocked at a property.
Resource Type	Picklist selections are as follows: ○ **Critical.** The item is necessary for an event to occur. The application tries to reserve this item when a quote is created. ○ **General.** The item is noncritical; that is, not necessary for an event to occur. ○ **Non Critical.** The item is noncritical; that is, not necessary for an event to occur.
Revenue Sub Category	Revenue subcategory with which to associate this item.
Revenue Category	Read only. Populated from the selected Revenue Sub Category.
Parent Revenue Category	Read only. Populated from the selected Revenue Sub Category.
Substitutes	The products that can be substituted for the current product. Displayed selections are limited to those of the same Product Type as the current product. You can select multiple substitutes. This enables users to select substitute products from the list of those you specify.
Recommendation Message	A message that a user can use to influence a customer to buy the product. For example, if the product is an entree, you might specify a wine that is compatible with that entree.
Preventative Maintenance Plan	Allows you to associate a preventative maintenance plan with the product. After being associated with a preventative maintenance plan in this view, the product becomes visible on the Administration - Preventive Maintenance screen, Products view. For more information about preventative maintenance plans, see the chapter on preventive maintenance in *Siebel Field Service Guide* .
Start Date	The first day when the product is available. Default value is the current date.
End Date	The last day when the product is available.

Field	Comments
Generic Product	Allows you to associate a single generic product with the current property-specific product. Siebel Hospitality uses this information when generating a quote to map this specific product to the associated generic product specified in the opportunity. Selections are limited to products of Type equal to Generic, and with valid start and end dates. The current product will replace the specified generic product in quotes.

5. (Optional) Click Check Description Spelling to check the spelling in the Description field.

When you save the record, Siebel Hospitality creates the product, releases it, and associates it with the default catalog category for the current property.

Associating Prices with a Property-Specific Product

You can define prices for the current product for specified time periods. You can define multiple prices to cover different time periods.

> **Note:** It is recommended that you assign a price to every product that can be part of a menu or package. Even if the price of the menu or package bears no direct relationship to the sum of the prices of individual items, Siebel Hospitality uses the individual item prices to calculate how revenues are allocated.

This task is a step in *Process of Creating Property-Specific Products*.

To associate a price with a property-specific product

1. In the lower part of the Property Administration screen, Event Order/Menu Items view, click the Price subview tab.
2. On the Price list, add a new record and complete the necessary fields.

   Some fields are described in the table that follows.

Field	Comments
List Price	The price of this product for the specified time period.
Start Date	The first day when the specified price applies to this product. Default value is the current date.
End Date	The last day when the specified price applies to this product.
Service Charge Inclusive	Select to include the service charge in the specified List Price. Clear to indicate that the specified List Price does not include a service charge.

Field	Comments
Tax Inclusive	Select to include tax in the specified List Price. Clear to indicate that the specified List Price does not include tax.

Creating Assets for Property-Specific Products

You can create assets for the current product, and identify the physical locations of those assets.

This task is a step in *Process of Creating Property-Specific Products*.

To create an asset for a property-specific product

1. In the Property Administration screen, Event Order/Menu Items view, click the Assets subview tab.

   Some fields are described in the table that follows.

Field	Comments
Asset #	A unique, system-generated number for this asset record. Can be different from the Serial Number.
Product	The product with which this asset is associated.
Status	Select a status of Active or Available to make the asset available for use. This allows the asset to be selected for use at the property associated with the asset. Alternatively, select one of the other options to describe why it is not available for use.
Status Update Date	The date on which the status field was last updated.
Storage Room	Allows you to specify a physical location on the property where this asset is stored.
Serial #	A user-defined code that identifies this individual asset.
Last Inventory Date	The last date on which this asset was inventoried.

2. On the Assets list, add a new record and complete the necessary fields.

Process of Creating Property-Specific Menus

After you have created the simple F&B product items that are for sale at a selected property, you can use these F&B product items to populate menus.

To create property-specific menus in Siebel Hospitality, perform the following tasks:

1. *Adding Menus to a Property*
2. *Adding Items to a Property-Specific Menu*
3. *Associating Prices with a Property-Specific Menu*

This process is a step in *Roadmap for Setting Up Menus and Packages*.

Adding Menus to a Property

To add menu records to a selected property, follow this procedure.

This task is a step in *Process of Creating Property-Specific Menus*.

To add a menu to a property

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property to which to add a menu, and drill down on the Name field of the property.
3. Click the Menus view tab.
4. In the Menus list, add a new record and complete the necessary fields.

   Some fields are described in the table that follows.

Field	Comments
Type	The type of menu. Determines the pricing method. Menu Per Person value is automatically selected and read only. This value provides one menu for each person. The price can be a fixed price for each person, or a variable price for each person, depending on the child menu items selected.
Grouping	Identifies related groups of menus. Allows users to do searches for menus classified by these related groups. For example, Dinner might be a grouping, and this can help users to find all the dinner menus that are accessible at a property.
List Price(s)	Read only. Can contain multiple prices, each valid for a different time period. The field shows the first price in the list. To see all prices, open the single selection dialog box in this field.
Split Pricing	Read only. Identifies this menu as having a variable price for each person depending on the child menu items selected. If any of the child menu items have a Split Menu Price defined, then this check box is selected.

Field	Comments
Fixed	Select to prevent users from adding, deleting, or changing the quantities of menu items in the Quote, Order, and Event Check views. Administrators, however, can still add, delete, and change the quantities of menu items in the Administration views.
Revenue Sub Category	Select a revenue subcategory with which to associate this menu. For revenue allocation purposes, the selection in this field overrides the categories of the child menu items. For more information about revenue allocations, see *Revenue Allocations for Menus and Packages*.
Revenue Category	Read only. Populated from the selected Revenue Sub Category.
Parent Revenue Category	Read only. Populated from the selected Revenue Sub Category.
Grouping	The type of meal or occasion for which the menu is designated.
Recommendation Message	Enter a message that a user can use to influence a customer to buy the menu. For example, specify that the menu is particularly suitable for formal dinners.
Start Date	The first day when the menu is available. Default value is the current date.
End Date	The last day when the menu is available.

5. (Optional) Click Check Description Spelling to check the spelling in the Description field.

Adding Items to a Property-Specific Menu

After creating a menu record, you can add menu items from the list of products that are associated with the current property. You can add one item at a time, or you can add multiple items at once.

This task is a step in *Process of Creating Property-Specific Menus*.

Adding One Item to a Menu

To add one item to a property-specific menu, follow this procedure.

To add one item to a menu

1. In the lower part of the Property Administration screen, Menus view, click the Menu Items subview tab.
2. On the Menu Items list, click New.
3. In the new record, complete the necessary fields.

Some fields are described in the table that follows.

Field	Comments
Name	Select an item to add to the menu. Most other fields are populated from this selection. Choices are limited to products of Type equal to Menu Item, with valid start and end dates.
Course #	Sequence number that determines how the menu prints in the Banquet Event Order (BEO) Report. For more information on the Banquet Event Order Report, see *About the Banquet Event Order Report*.
Split Menu Price	Enter a price to designate this item as a split menu item. When this item is added to a menu, the Split Pricing field of the menu will be selected. When an item with a defined Split Menu Price is added to a quote, this price populates the Negotiated Price field of the item. **Note:** If this menu item does not have a defined Split Menu Price, then the price is irrelevant in the context of the menu. This is because the price of the menu item is based on the per person price defined for the menu.
List Price(s)	Read only. Can contain multiple prices, each valid for a different time period. The field shows the first price in the list. To see all prices, open the single selection dialog box in this field.
Qty	The quantity of this item that is included in the menu. Default value is 1.

Adding Multiple Items to a Menu

To add multiple items to a property-specific menu, follow this procedure.

To add multiple items to a menu

1. In the lower part of the Property Administration screen, Menus view, click the Menu Items subview tab.
2. On the Menu Items list, click Add Items.

   Siebel Hospitality displays the Add Products dialog box.
3. In the Add Products dialog box, multi-select the items to add to the current menu and click Add.

   Siebel Hospitality displays the Menu Items list with the products you selected added to the menu.
4. In each of the menu items you entered, complete the necessary fields. Some fields are described in the table in *Adding One Item to a Menu*.

Associating Prices with a Property-Specific Menu

You can define prices for the current menu for specified time periods. You can define multiple prices to cover different time periods.

This task is a step in *Process of Creating Property-Specific Menus*.

To associate a price with a property-specific menu

1. In the lower part of the Property Administration screen, Menus view, click the Price subview tab.
2. On the Price list, add a new record and complete the necessary fields.

   Some fields are described in the table that follows.

Field	Comments
List Price	The price of this menu for the specified time period.
Start Date	The first day when the specified price applies to this menu. Default value is the current date.
End Date	The last day when the specified price applies to this menu.
Service Charge Inclusive	Select to include the service charge in the specified List Price. Clear to specify that the specified List Price does not include a service charge.
Tax Inclusive	Select to include tax in the specified List Price. Clear to specify that the specified List Price does not include tax.

Process of Creating Property-Specific Packages

After you have created the simple product items and menus that are for sale at a property, you can use these simple product items and menus to populate packages.

To create property-specific packages in Siebel Hospitality, perform the following tasks:

1. *Adding Packages to a Property*
2. *Adding Items to a Property-Specific Package*
3. *Associating Prices with a Property-Specific Package*

This process is a step in *Roadmap for Setting Up Menus and Packages*.

Adding Packages to a Property

To add package records to a property, follow this procedure.

This task is a step in *Process of Creating Property-Specific Packages*.

To add a package to a property

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property to which to add a package and drill down on the Name field of the property.
3. Click the Packages view tab.
4. In the Packages list, add a new record and complete the necessary fields.

   Some fields are described in the table that follows.

Field	Comments
Type	The type of package. The selection determines the pricing method. Selection options are as follows: o **Package Each.** Fixed price for a quantity of 1 of the package, regardless of the number of people. o **Package Item Price.** Variable price for each person where individual item prices are broken out. o **Package Per Person.** Fixed price for each person where individual item prices are not broken out.
Grouping	Identifies related groups of packages. Allows users to perform searches for packages classified by these related groups. For example, Audio Visual Package might be a grouping, and this can help users to find all the audio-visual packages at a property.
UoM	The default value changes dynamically according to the selection in the Type field, as follows: o Default value is Per Person if Type is equal to Package Per Person. o Default value is Each if Type is equal to Package Each. o Default value is Each if Type is equal to Package Item Price.
Fixed	Select to prevent users from adding, deleting, or changing the quantities of package items in the Quote, Order, and Event Check views. Administrators, however, can still add, delete, and change the quantities of package items in the Administration views.
Start Date	The first day when the package is available. Default value is the current date.
End Date	The last day when the package is available.

Field	Comments
Use System Allocation	If selected, Siebel Hospitality calculates a per person allocation for the child items of this package, while associating a package into function line items. This field is read-only under the following conditions: o The package is, or contains a child package that is, of Type equal to Package Item Price. o The package contains a Split Menu.

5. (Optional) Click Check Description Spelling to check the spelling in the Description field.

Adding Items to a Property-Specific Package

After creating a package record, you can add package items from the list of products that are associated with the current property. A package can include simple products, both F&B and non-F&B items. A package can also include other complex products, such as menus and other packages. You can add one item at a time, or you can add multiple items at once.

Note: If you add a menu or another package to the current package, Siebel Hospitality does not display the child items of the component menu or package.

This task is a step in *Process of Creating Property-Specific Packages*.

Adding One Item to a Package

To add one item to a property-specific package, follow this procedure.

To add one item to a package

1. In the lower part of the Property Administration screen, Packages view, click the Package Items subview tab.
2. On the Package Items list, click New.
3. In the new record, complete the necessary fields. Some fields are described in the table that follows.

Field	Comments
Name	Select an item to add to the package. Most other fields are populated from this selection.
Per Person Allocation	If the Type of the current package record is Package Per Person or Package Each, use this field to manually designate the per person monetary amount to allocate to individual items in the package. The Per Person Allocation values for package items must add up to the total price for the parent package. No validation check occurs. In other words, Siebel Hospitality does not force the sum of package item prices to be equal to the total price for the parent package. However,

Field	Comments
	Siebel Hospitality does display a per person allocation total for all package items at the end of the Per Person Allocation column. For more information about allocations, see *Revenue Allocations for Menus and Packages*.
Split Menu	Read only. When selected, identifies a component menu as a split-price menu.
List Price(s)	Can contain multiple prices, each valid for a different time period. The field shows the first price in the list. To see all prices, open the single selection dialog box in the field.
Qty	The quantity of this item that is included in the package. Default value is 1.

4. (Optional) Click Check Description Spelling to check the spelling in the Description field.

Adding Multiple Items to a Package

To add multiple items to a property-specific package, follow this procedure.

To add multiple items to a package

1. In the lower part of the Property Administration screen, Packages view, click the Package Items subview tab.
2. On the Menu Items list, click Add Items.

   Siebel Hospitality displays the Add Products dialog box.
3. In the Add Products dialog box, select each item to add to the current package and click Add.

   Siebel Hospitality displays the Package Items list with the products you selected added to the package.
4. For each of the items you entered, complete the necessary fields. Some fields are described in the table in *Adding One Item to a Package*.

Associating Prices with a Property-Specific Package

You can define prices for the current package for specified time periods. You can define multiple prices to cover different time periods.

This task is a step in *Process of Creating Property-Specific Packages*.

To associate a price with a property-specific package

1. In the lower part of the Property Administration screen, Packages view, click the Price subview tab.
2. On the Price list, add a new record and complete the necessary fields.

   Some fields are described in the table that follows.

Field	Comments
List Price	The price of this package for the specified time period.
Start Date	The first day when the specified price applies to this package. Default value is the current date.
End Date	The last day when the specified price applies to this package.
Service Charge Inclusive	Select to include the service charge in the specified List Price. Clear to specify that the specified List Price does not include a service charge.
Tax Inclusive	Select to include tax in the specified List Price. Clear to specify that the specified List Price does not include tax.

Sharing Property-Specific Products with Other Properties

You can make property-specific products, including property-specific menus and packages, available to users at other properties. You do this by creating a property cluster that includes the original property of the products and the target property with which to share the products, then assigning the property cluster to the users to whom you want the products to be visible at the target property. For more information about creating and assigning product clusters, see *Process of Setting Up Property Clusters*.

This task is a step in *Roadmap for Setting Up Menus and Packages*.

Process of Performing Ongoing Menus and Packages Administration

This topic lists the tasks typically performed by administrators when administering property-specific menus and packages on an ongoing basis, when and as required. Your company might follow a different process according to its business requirements.

To administer property-specific menus and packages in Siebel Hospitality, perform the following tasks:

- *Assigning Property-Specific Products to Catalog Categories*
- *Creating Pricing Intervals for Property-Specific Products*
- *Viewing Property Price Lists*

- *Setting User Properties for Menus and Packages*

This process is a step in *Roadmap for Setting Up Menus and Packages*.

Assigning Property-Specific Products to Catalog Categories

You can associate property-specific products with catalog categories other than the default catalog category for a property. You do this by associating additional catalog categories with the property, and then adding products to those categories. For more information about default catalog categories for properties, see *Associating a Default Catalog Category with a Property*.

This task is a step in *Process of Performing Ongoing Menus and Packages Administration*.

To assign a property-specific product to a catalog category

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property to which to add a catalog category, and drill down on the Name field of the property.
3. Click the Catalog Categories view tab.
4. In the Catalog Categories list, add a new record and complete the necessary fields.

   Some fields are described in the table that follows.

Field	Comments
Effective Start Date	The first day when the category applies to this property. Default value is the current date.
Effective End Date	The last day when the category applies to this property.
Private	Select to make this category visible only to users belonging to the access groups associated with the category. If the category is private, all associated products are also private.
Count	The number of products associated with this category.

5. On the Products list in the lower part of the Catalog Categories view, add a record for the product to associate with the selected catalog category.

Creating Pricing Intervals for Property-Specific Products

You can make products available for sale during specified times, and prevent products from being sold during other times, by creating pricing intervals.

This task is a step in *Process of Performing Ongoing Menus and Packages Administration*.

To create a pricing interval for a property-specific product

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property for which you want to create a new pricing interval, and drill down on the Name field of the property.
3. Depending on the type of product (for which you want to create a new pricing interval), perform one of the actions outlined in the following table.

For this product type:	Action:
Event order item	Click Event Order/Menu Items
Menu item	Click Event Order/Menu Items
Menu	Click Menus
Package	Click Packages

4. Select the product for which to create a new pricing interval.
5. Click the Price subview tab.
6. Select the price list item for which to create a new price interval, and click New Pricing Interval.
   Siebel Hospitality creates a duplicate of the selected record, with all fields filled from the original record except for List Price, Start Date, and End Date.
7. In the List Price field, enter a price to be effective during the new time interval.
8. Enter dates in the Start Date and End Date fields.
   Note the following characteristics of the resulting records:
   - The Default value of the Start Date of the new price interval record is the date and time when that record was created.
   - Siebel Hospitality does not allow price records with overlapping time intervals. Make sure the time interval covered by the Start Date and End Date you specify does not overlap the time interval covered by the Start Date and End Date of any other price records.
   - If the previous price record does not have an End Date, when you save the new price interval record, the Start Date of the new price interval record becomes the End Date of the previous price record.

Note: To remove a product from sale for a specific time interval, create pricing interval records for a product that leave that time interval uncovered. For example, to remove a product from sale from January 11, 2010 through February 11, 2010, and then put it on sale again, enter a value of 1/11/2010 12:00:00 AM as the End Date of one pricing interval record and a value of 2/12/2010 12:00:00 AM as the Start Date of the next pricing interval record.

Viewing Property Price Lists

You can view the prices being charged for all the product items at a selected property, regardless of type, in one list.

This task is a step in *Process of Performing Ongoing Menus and Packages Administration*.

To view a property price list

1. Navigate to the Property Administration screen, then the Properties view.
2. Identify the property with the price list you want to view, and drill down on the Property Name field.
3. Click the Price List Items view tab.

   Siebel Hospitality displays a list of all products that are for sale at the current property. Some fields are described in the table that follows.

Field	Comments
Service Charge Inclusive	Select to include the service charge in the List Price. Clear to specify that the List Price does not include a service charge.
Tax Inclusive	Select to include tax in the List Price. Clear to specify that the List Price does not include tax.
Revenue Sub Category	Select a revenue subcategory with which to associate this item.
Revenue Category	Read only. Populated from the selected Revenue Sub Category.
Parent Revenue Category	Read only. Populated from the selected Revenue Sub Category.
Start Date	The first day when the product is available. Default value is the current date.
End Date	The last day when the product is available.

4. To modify a product price, select a record and change the value in the List Price field.

Setting User Properties for Menus and Packages

You can set user properties to modify or enhance the Menus and Packages views in Siebel Hospitality. For more information about these user properties, see *User Properties for Menus and Packages*.

This task is a step in *Process of Performing Ongoing Menus and Packages Administration*.

Revenue Allocations for Menus and Packages

In the context of menus and packages in Siebel Hospitality, *allocation* means how much revenue is assigned to each item in a menu or package. Because different items might belong to different revenue streams, you can designate what portion of the total revenue Siebel Hospitality allocates to each item in a package.

The revenue allocation for a product goes to a revenue category. Revenue allocation mechanisms are different for menus and for packages.

Menu revenue allocation. The revenue allocation for a menu is determined by the current list price and revenue category of the parent menu record. A menu has a designated revenue category, and the individual menu items also have revenue categories that might be different from the revenue category of the parent menu. In this case, the revenue category of the parent menu overrides the revenue categories of the child items, and all revenue for a menu goes to the revenue category of the parent menu.

Package revenue allocation. A package does not have a revenue category, but the individual package items do. In the case of a package, the revenue is allocated to the revenue categories of the child items. You can calculate the revenue allocation manually, or Siebel Hospitality can calculate the revenue allocation automatically.

If Siebel Hospitality performs the revenue allocation for a package, the result is determined by whether system allocation is selected in the parent package record, and by the revenue categories and quantities of the individual child package items. In each child package item, Siebel Hospitality first looks at the per person allocation. If the per person allocation does not have a value, Siebel Hospitality then looks for the list price.

Examples of revenue allocations are as follows:

- **Event order item or menu item.** Consider the case of a single menu item or event order item, such as a television set. This simple product belongs to the Audio-Visual revenue category. The price of this item is 20.00. All of that 20.00 is attributed to the Audio-Visual revenue category.
- **Menu.** Consider a menu with two F&B items, steak and ice cream. Steak is associated with the Dinner Entrees revenue category, while ice cream is associated with the Dinner Dessert revenue category. The menu itself, however, is associated with the Dinner Entree revenue category. Consequently, the entire price of the menu, including the ice cream, will go to the Dinner Entree revenue category.
- **Package.** Finally, consider a package, in which you can specify how much revenue to allocate to each revenue category of the package items. The package has three items with individual prices of 10.00 each, for a total of 30.00. If the items are sold separately, the full prices are allocated to the respective revenue categories of the products.

  The package, however, is priced at 20.00. If you calculate the allocations manually, you might designate the allocations as Product A allocation equals 10.00, Product B allocation equals 5.00, and Product C allocation equals 5.00. If you create system-generated allocations, Siebel Hospitality performs a calculation that is weighted by the list prices and quantities of the component products. In the case of a package that has three items with individual prices of 10.00 each, where the package price is 20.00, an automatic allocation gives 6.66 to each revenue category of the products.

  > **Note:** When calculating allocations, consider the quantities of the items involved. For example, if the list price of a package line item is 50.00 and the quantity is 2, then that item contributes 100.00 to the price of the package.

Scenarios for System-Calculated Revenue Allocations

This topic gives the following examples of how system-calculated revenue allocations might be used. You might use system-calculated revenue allocations differently, depending on your business model.

This topic contains the following topics:

- *Calculating Allocations for a Two-Item Package*
- *Calculating Allocations for a Two-Item Package with Discounted Price*
- *Calculating Allocations for a Three-Item Package with Menu Per Person*
- *Calculating Allocations for a Package Within a Package*

Calculating Allocations for a Two-Item Package

A sales representative enters a basic package containing two items. The following table shows an example of how Siebel Hospitality might calculate revenue allocations for this type of package. Each item in the table has a quantity of 1.

Package Breakdown	List Price	Negotiated Price	Unit Net Price	Formula	Per Person Allocation
Package Per Person	100.00	100.00	100.00	None	Not applicable
— Event Order Item	50.00	Not applicable	Not applicable	(50/(50+60))*100	45.45
— Menu Item	60.00	Not applicable	Not applicable	(60/(50+60))*100	54.55

Siebel Hospitality determines the revenue contribution percentage of each item from the list price of the item. The list price of an item divided by the total of the item list prices equals the contribution percentage of that item. Multiply this contribution percentage by the unit net price of the package to determine how much that item contributes to the price of the package.

Calculating Allocations for a Two-Item Package with Discounted Price

A sales representative enters a basic package containing two items. This package has a discounted price. The following table shows an example of how Siebel Hospitality might calculate revenue allocations for this type of package. This scenario is similar to *Calculating Allocations for a Two-Item Package*, except that the customer has negotiated a lower price. Each item in the table has a quantity of 1.

Package Breakdown	List Price	Negotiated Price	Unit Net Price	Formula	Per Person Allocation
Package Per Person	100.00	80.00	80.00	None	Not applicable
— Event Order Item	50.00	Not applicable	Not applicable	(50/(50+60))*80	36.36
— Menu Item	60.00	Not applicable	Not applicable	(60/(50+60))*80	43.64

Siebel Hospitality determines the revenue contribution percentage of each item from the list price of the item. The list price of an item divided by the total of the item list prices equals the contribution percentage of that item. Multiply this contribution percentage by the unit net price of the package to determine how much that item contributes to the price of the package.

Calculating Allocations for a Three-Item Package with Menu Per Person

A sales representative enters a basic package that includes a menu per person as a line item. The following table shows an example of how Siebel Hospitality might calculate revenue allocations for this type of package. Each item in the table has a quantity of 1.

Package Breakdown	List Price	Negotiated Price	Unit Net Price	Formula	Per Person Allocation
Package Per Person	50.00	50.00	50.00	None	Not applicable
— Event Order Item	20.00	Not applicable	Not applicable	(20/(20+10+25))*50	18.18
— Menu Item 1	10.00	Not applicable	Not applicable	(10/(20+10+25))*50	9.09
— Menu Per Person	25.00	Not applicable	Not applicable	(25/(20+10+25))*50	22.73
— — Menu Item 2	Not applicable	Not applicable	Not applicable	None	Not applicable
— — Menu Item 3	Not applicable	Not applicable	Not applicable	None	Not applicable

The contribution percentage for the menu per person is based on the list price of the menu per person. (However, if the menu per person is a split menu, Siebel Hospitality ignores it and does not include it in any calculations.)

Calculating Allocations for a Package Within a Package

A sales representative enters a package within a package. The following table shows an example of how Siebel Hospitality might calculate revenue allocations for this type of package. Each item in the table has a quantity of 1.

Package Breakdown	List Price	Negotiated Price	Unit Net Price	Formula	Per Person Allocation
Package Per Person 1	50.00	50.00	50.00	None	Not applicable
— Event Order Item	20.00	Not applicable	Not applicable	(20/(20+25))*50	22.22
— Package Per Person 2	25.00	Not applicable	Not applicable	None	Not applicable
— — Menu Item 1	20.00	Not applicable	Not applicable	(20/(20+18))*((25/(20+25))*50)	14.62
— — Menu Per Person	18.00	Not applicable	Not applicable	(18/(20+18))*((25/(20+25))*50)	13.16
— — — Menu Item 2	10.00	Not applicable	Not applicable	None	Not applicable
— — — Menu Item 3	20.00	Not applicable	Not applicable	None	Not applicable

To calculate the contribution percentages of the items in the child package, Siebel Hospitality first calculates the contribution percentage of the child package. Siebel Hospitality then calculates the contribution percentages of the child line items of the package to the contribution percentage of the child package. A breakdown of the calculation steps follows.

1. The price of Package Per Person 1 is 50.
2. This 50 is made up of Event Order Item and Package Per Person 2.
3. The per person allocation for Event Order Item out of the 50 is 22.22.
4. This leaves 27.78 of the 50 for Package Per Person 2.
5. Siebel Hospitality now determines how to allocate the 27.78 to the items in Package Per Person 2.
6. Siebel Hospitality determines the contribution percentage of Menu Item 1 and Menu Per Person within Package Per Person 2.
7. The contribution percentage of Menu Item 1 equals ((20/(20+18)).
8. The contribution percentage of the Menu Per Person equals (18/(20+18)).
9. The contribution percentages of Menu Item 1 and Menu Per Person, multiplied by 27.78, determine how much of the 27.78 to allocate to each of the respective line items.

Note: If another level of a package within a package exists, Siebel Hospitality follows the same iterative process to determine the per person allocations for that package.

8 Setting Up Inventory Controls

Setting Up Inventory Controls

This chapter describes how to set up inventory controls for function spaces, sleeping rooms, and suites as well as how to define out-of-order and unavailable function spaces. It includes the following topics:

- *Process of Setting Up Inventory Controls*
- *Viewing Inventory Controls and Visibility*
- *Defining Function Space and Suite Inventory Controls*
- *Defining Sleeping Room Inventory Controls*

Process of Setting Up Inventory Controls

The following list shows the procedures that administrators typically perform to set up hospitality inventory controls. Your company might follow a different process according to its business requirements.

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

1. *Viewing Inventory Controls and Visibility*
2. *Defining Function Space and Suite Inventory Controls*
3. *Defining Sleeping Room Inventory Controls*

Viewing Inventory Controls and Visibility

The inventory control records that can be viewed by a user depend on the visibility layers. Three different layers of visibility can be assigned to users. To assign visibility, you must add the appropriate views to each user's responsibilities. The following table describes each visibility option and the appropriate records that users are able to access.

Visibility Tier	Description
My Properties	Users who have a specific property assigned to them can only see inventory control records relating to that particular property.
My Clusters Properties	Users who are members of a specific cluster can only see inventory control records relating to the properties in their particular clusters. For more information about clusters, see *Assigning Clusters to a User*.
All Properties	Users who are capable of viewing all properties (for example, administrators) can see inventory control records relating to all properties.

See *Using Siebel Tools* for more information on how to add views to user responsibilities.

Defining Function Space and Suite Inventory Controls

An administrator can create inventory controls for specific spaces, categories, and suites.

This task is a step in *Process of Setting Up Inventory Controls*.

Authorization, Overbook, and Option Level Inventory Controls

Authorization level inventory controls are specified to limit the number of reserved, concurrent bookings that can be made for a category or suite. These inventory controls must be created for each category. They can only be created for a category or suite. The value entered for the authorization level can be less, equal, or more than the capacity. When this limit is reached, the inventory status remains Unreserved unless overbook and option level inventory controls are defined for the function space.

Overbook and option level inventory controls can be specified to limit the number of overbookings and options that can be made for a function space. These inventory controls are used to determine the number of overbooked or optioned bookings that the function spaces can support.

> **Note:** You must create separate authorization, option, and overbook level inventory controls for each function space. Inventory controls do not apply across an entire property.

For example, the function space category titled Small has Salon A, B, C, and D as components. This category can be reserved four times, and this value is automatically entered into the Capacity field in the Inventory Control list.

If you specify an authorization level of 5, this function space can be reserved up to a maximum of five times even though it has capacity for four. After reaching this limit, you can either option or overbook the function space, provided you have already defined these types of inventory controls. If you specify an option level of 2 and an overbook level of 1 for the function space, you can option it twice and overbook it once. If you try to option or overbook the space beyond these limits, the inventory status will remain Unreserved.

Defining Function Space Inventory Controls

This procedure assumes that the administrator has already created the appropriate function spaces for the property. For more information, see *Setting Up Function Space Categories for a Property*.

To define function space inventory controls

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record, and then click the link in the Property Name field.
3. Click the Inventory Control view tab.

   You are brought to the Function Space view.
4. In the Inventory Controls list, create a new record.
5. Enter a start date and end date for the inventory control.

The start and end date values are validated. The Start Date value must be less than or equal to the End Date value and the duration between Start Date and End Date cannot be greater than one year.

6. In the Function Space field, click the single select button, and choose the appropriate specific space, category, or suite.

   > **Note:** The function spaces displayed in the Pick Function Space dialog box include only those spaces that are effective throughout the entire specified time period.

7. Choose the appropriate rule from the Rule Type drop-down list:

   - Choose Authorization Level to define a limit for the number of bookings that can be reserved concurrently for this function space on this date. Note that this option is only available if you are defining the rule for a function space or suite category.
   - Choose Option Level to define a limit for the number of bookings that can be optioned for this function space on this date.
   - Choose Overbook Level to define a limit for the number of bookings that can be overbooked for this function space on this date.

8. In each authorization field, set the rule levels for each day of the week.

   You can specify different levels of authorization, optioning, and overbooking for the same day.

   If a rule date range spans less than a week, then only the days of the week included in the range are editable under the Rules. For example, if the start date is January 26, 2009 and the end date is January 28, 2009, you can only enter values for Monday, Tuesday, and Wednesday. The rest of the days are read only.

9. Select the inventory control records to use, and click Apply.

   You can select multiple records from the Rules drop-down list and apply the inventory controls for all of them at once.

   The results of the applied inventory controls appear in the Valid Authorizations Levels list, starting from the first day applied.

   > **Note:** Inventory control rules can overlap. When you apply a new rule and it has overlapped values, the new rule overwrites the old record values or creates new values if necessary.

Information Display Options in the Valid Authorization Levels List

There are various controls that can be used with the Valid Authorizations list. These include:

- *About the Dates/Notes Button*
- *About the Paging Buttons*

About the Dates/Notes Button

Click this button to view information about special dates, holidays, or sell notes for the displayed days. If any of the days shown in the Valid Authorization Levels list have special dates, holidays, or sell notes information associated with them, this information appears in the Special Dates/Sell Notes dialog box.

About the Paging Buttons

There are four paging buttons that you can use to navigate within this view: Previous column set, Previous column, Next column, and Next column set. These buttons are located in the upper corner of the view.

The paging buttons are:

- **Next column.** Use this button to move forward one day at a time.
- **Previous column.** Use this button to move backward one day at a time.
- **Next column set.** Use this button to move forward one week at a time.

  For example, if the chosen date was Sunday October 12, 2008, when you click the Next column set button, the view moves forward one week to display Sunday October 19, 2008.
- **Previous column set.** To move backward one week, click the Previous column set button.

Querying for Function Space Inventory Controls

When function space inventory controls are defined and applied in the Inventory Controls list, they then appear in the Valid Authorization Levels list underneath. This list allows you to query for information using the standard Query button. However, you can also query for specific dates by clicking the Query Date button.

To query for function space inventory controls on specific dates

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record, and then click the link in the Property Name field.
3. Click the Inventory Control view tab.
4. Click the Function Space link to navigate to that view.
5. In the Valid Authorization Levels list, click the Query Date button.

   The Query Date dialog box appears.
6. Click the calendar select button, and choose the appropriate date.
7. Click Go.

   The date for which you queried and the following seven days are displayed.

Editing Function Space Inventory Controls

If you only have to edit the inventory controls for a few days, it is recommended that you perform this action in the Valid Authorizations list. However, if you have to change inventory controls for a longer time period, it is recommended that you create new inventory controls in the Inventory Controls list and apply the rules. The new rules override any existing inventory controls that had been applied for this time period.

> **Note:** Changes in the Valid Authorization view are automatically applied. You do not have to click Apply to apply your changes.

Defining Sleeping Room Inventory Controls

An administrator can create inventory controls for sleeping rooms. This process assumes that the administrator has already created the appropriate sleeping rooms for the property. For more information, see *Creating Sleeping Room Records*.

This task is a step in *Process of Setting Up Inventory Controls*.

Group authorized level inventory controls are specified to limit the number of reserved, concurrent bookings that can be made for sleeping rooms. These inventory controls must be created for each sleeping room type. The value entered for the group authorized level can be less than, equal to, or more than the capacity. When this limit is reached, the inventory status remains Unreserved unless you overbook the sleeping room. Unlike function spaces, no limits are defined for overbooking sleeping rooms. This lack of limitation means that as soon as the group authorized level limit is reached, you can then choose to overbook the sleeping rooms as many times as necessary.

To define sleeping room inventory controls

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record, and then click the link in the Property Name field.
3. Click the Inventory Control view tab.
4. Click the Sleeping Room link to navigate to that view.
5. In the Inventory Controls list, create a new record.
6. Enter a start and end date for the inventory control.

   The start and end date values are validated. The Start Date value must be less than or equal to the End Date value and the duration between Start Date and End Date cannot be greater than one year.
7. In the Sleeping Room field, click the single select button, and choose the appropriate sleeping room type.

   > **Note:** The sleeping room types displayed in the Pick Room Type dialog box include only those types that are effective throughout the entire specified time period.

8. Choose the appropriate rule from the Rule Type drop-down list:
   - Choose Group Authorized Level to define a limit for the number of reserved, concurrent bookings that can be made for this sleeping room type.
   - Choose Group Optimal Level to enter the group optimal value for this sleeping room type. This value represents what the revenue manager thinks is the ideal level between group and transient availability and is used for sleeping room calculations.
9. Select the inventory control records to use, and click Apply.

   The results of the applied inventory controls appear in the Total Group Availability list, starting from the first day applied.

   > **Note:** If the Sleeping Room field value is of an ROH Sleeping Room type, then the inventory controls are set to 0 for all days of the week, and you cannot enter a quantity greater than 0 in these fields. If the Sleeping Room field value is of a Sleeping Room or Suite type, then the inventory controls are user-defined and can be greater than or equal to 0.

Information Display Options in the Total Group Availability List

There are various controls that can be used with the Total Group Availability list. These include:

- **Dates/Notes button.** See *About the Dates/Notes Button* for more information.
- **Paging buttons.** See *About the Paging Buttons* for more information.
- **Tentative/Not Tentative button.** See *With Tentative/Without Tentative Button* for more information.

Editing Sleeping Room Inventory Controls

If you only have to edit the inventory controls for a few days, it is recommended that you perform this action in the Total Group Availability list. However, if you have to change inventory controls for a longer time period, it is recommended that you create new inventory controls in the Inventory Controls list and apply the rules. The new rules override any existing inventory controls that previously applied for this time period.

> **Note:** Changes in the Total Group Availability view are automatically applied. You do not have to click Apply to apply your changes.

Querying for Sleeping Room Inventory Controls

When sleeping room inventory controls are defined and applied in the Inventory Controls list, they are then displayed in the Total Group Availability list underneath. This list allows you to query for information using the standard Query button. However, you can also query for specific dates by clicking the Query Date button.

This task is a step in *Process of Setting Up Inventory Controls*.

To query for sleeping room inventory controls on specific dates

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record, and then click the link in the Property Name field.
3. Click the Inventory Control view tab.
4. Click the Sleeping Room link to navigate to that view.
5. In the Total Group Availability list, click the Query Date button.

   The Query Date dialog box appears.
6. Click the calendar select button and choose the appropriate date.
7. Click Go.

   The date for which you queried and the following seven days are displayed.
8. Complete the rest of the fields, specifying the start and end duration and the reason the function space is out of order, and then save the record.

   > **Note:** You can drill down on the Start Date Time value to navigate to the Function Space Diary where the selected date and the appropriate property are displayed.

9 Defining Day Parts, Status Indicators, and Setup Style Translations

Defining Day Parts, Status Indicators, and Setup Style Translations

This chapter describes how to set up the day parts, status indicators, and setup style translations for a property. It includes the following topics:

- *About Function Space Administration*
- *Process of Defining Day Parts, Status Indicators, and Setup Style Translations*
- *Setting Up Property Day Parts*
- *Defining Function Space and Asset Inventory Status Indicators*
- *Defining Setup Style Translations for Function Spaces*
- *Setting User Properties for the Function Space Diary*

About Function Space Administration

The Function Space Administration screen is used to set up the day parts of a property, and to define status indicators for the Function Space Diary. The diary is used by sales representatives, event managers, and revenue managers to manage day-to-day bookings of function space and optimize event operations.

An administrator can also use the Function Space Administration screen to set up the translation table used to generate quotes.

Process of Defining Day Parts, Status Indicators, and Setup Style Translations

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

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

1. *Setting Up Property Day Parts*
2. *Defining Function Space and Asset Inventory Status Indicators*
3. *Defining Setup Style Translations for Function Spaces*
4. *Setting User Properties for the Function Space Diary*

Setting Up Property Day Parts

Before the Function Space Diary can be used, either the administrator or the corporate revenue manager must segment the operational day into periods of time and then set up these day parts for the Function Space Diary. Display day parts are set up at the corporate level and then applied to each property. In the Function Space Diary, the user can select the Day/Day-Part display option to view each day with the time axis divided into the defined day parts.

> **Note:** It is recommended that administrators activate the Audit Trail option so that changes to existing records are tracked. The Audit Trail Engine must be configured to use the Audit Trail option. For more information on configuring and using Audit Trail, see *Siebel Applications Administration Guide* .

This task is a step in *Process of Defining Day Parts, Status Indicators, and Setup Style Translations*.

To set up day parts

1. Navigate to the Property Administration screen, then the Day Parts view.
2. In the Day Parts list, create a record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Day Part Name	The name of the day part. For example, Morning.
Start Time End Time	The start time of the day part, and the time that the day part ends. Day parts can span two different days. For example, a day part might run from 10 p.m. until 3 a.m. However, day parts can only span one 24-hour time period.
Comments	Notes for the corresponding Day Part record.

To validate day parts

1. Navigate to the Property Administration screen, then the Day Parts view.
2. Click Validate.

   If there are any gaps or overlaps between the day parts, a dialog box is displayed prompting you to recheck the day part definitions. A check is also run to make sure that the sum of all day parts totals 24 hours. If the day parts are validated, then focus will move to the last day part in the list.

Defining Function Space and Asset Inventory Status Indicators

Revenue managers can manage the display of function space in the Function Space Diary by specifying the colors used to denote the inventory status of function spaces as well as specifying the line patterns that signify setup and tear-down times.

This topic contains the following topics and is a step in *Process of Defining Day Parts, Status Indicators, and Setup Style Translations*.

- *Defining Turntime and Time Interval Information for Function Space Display*
- *Defining Active and Backup Colors*
- *Defining Status Color Schemes for the Function Space Diary*
- *Defining Display Options for Child Functions and Dependencies*

Defining Turntime and Time Interval Information for Function Space Display

The revenue manager typically defines the display patterns (for example cross-hatched, downward hatched, and so on), that denote setup time and tear-down time in the Function Space Diary.

This task is a step in *Defining Function Space and Asset Inventory Status Indicators*.

To define turntime and time interval information

1. Navigate to the Function Space Administration screen, then the Function Space Diary Administration view.
2. In the FSD Administration form, complete the fields.

    a. In the Turntime Information section, select the display pattern type in the Setup Time and Tear Down Time fields.

    For example, select CROSS HATCHED.

    b. In the Time Interval Information section, select values in the Time Scale, Start Time, and End Time fields.

    For example, select Time Scale = Day/Hour. In this case, defining the time interval means that the Diary would be displayed in Day/Hour.

Defining Active and Backup Colors

Colors for both active and backup bookings can be defined. The colors defined here are used to differentiate between the two types of bookings in the Function Space Diary. For example, if *blue* is defined as the color for backup bookings, these bookings will appear with a blue border in the Function Space Diary.

This task is a step in *Defining Function Space and Asset Inventory Status Indicators*.

To define active and backup colors

1. Navigate to the Function Space Administration screen, then the Function Space Diary Administration view.
2. In the Active & Backup Information section, select colors in the Active Function Space field and Backup Function Space field.

   For example, select the values Blue and Yellow.

Defining Status Color Schemes for the Function Space Diary

You can define Function Space Diary color schemes for function inventory statuses, asset inventory statuses, quote statuses, and function statuses. Each status can be mapped to a different color. When a user selects either the Inventory Status, Quote Status, or Function Status color scheme in the diary, Siebel Hospitality applies the color scheme you entered to control which colors are used to display bookings in the diary.

This task is a step in *Defining Function Space and Asset Inventory Status Indicators*.

To define status color schemes for the Function Space Diary

1. Navigate to the Function Space Administration screen, then the Function Space Diary Administration view.
2. To define a color scheme for function inventory statuses, perform the following steps.
   a. Scroll down to the Function Color Schema list, and then click New.
   b. In the new record, select an inventory status and assign a color to that status.
   c. Repeat the two preceding steps for each function inventory status that must appear in the diary.

   Note: It is recommended that you not map the Unreserved status to a color, because this can cause the diary to become cluttered.
3. To define a color scheme for quote statuses, perform the following steps.
   a. Scroll across to the Quote Status Color Schema list, and then click New.
   b. In the new record, select a quote status and assign a color to that status.
   c. Repeat the two preceding steps for each quote status that must appear in the diary.
4. To define a color scheme for asset inventory statuses, perform the following steps.
   a. Scroll down to the Inventory Status Color Schema list, and then click New.
   b. In the new record, select an inventory status and assign a color to that status.
   c. Repeat the two preceding steps for each asset inventory status that must appear in the diary.

   Note: It is recommended that you map only the Booked and Double Booked asset inventory statuses, because the other statuses might unnecessarily fill up the asset inventory Scheduler control chart.
5. To define a color scheme for function statuses, perform the following steps.
   a. Scroll across to the Function Status Color Schema list, and then click New.
   b. In the new record, select a function status and assign a color to that status.
   c. Repeat the two preceding steps for each function status that must appear in the diary.
6. In the FSD Administration form, Color Display By field, select the basis for how diary colors are displayed.

   The color scheme options are as follows:

- **Inventory Status**. Displays events using the colors for inventory status values as defined in the Inventory Status Color Schema list.
- **Function Status**. Displays events using the colors for function status values as defined in the Function Status Color Schema list.
- **Quote Status**. Displays events using the colors for quote status values as defined in the Quote Status Color Schema list.

Defining Display Options for Child Functions and Dependencies

You can define the display options for child functions and child dependencies for detailing and space holds in the Function Space Diary. For more information about detailing and child functions (also known as subfunctions), see *About Function Detailing*.

This task is a step in *Defining Function Space and Asset Inventory Status Indicators*.

To define display options for child functions and dependencies

1. Navigate to the Function Space Administration screen, then the Function Space Diary Administration view.
2. In the FSD Administration form, complete the fields under the Detail/Space Hold Information heading.

   Some fields are described in the following table.

Field	Comments
Show Child Functions	Select the check box to display child functions in the Function Space Diary.
Show Child Dependencies	Select the check box to display child dependencies in the Function Space Diary.
Child Pattern	Select a pattern in which to display child functions in the Function Space Diary. Child functions are displayed with the same color values as the parent, and with the pattern you select in this field.

3. In the Function Color Schema list, add records for the appropriate inventory statuses.

   Options for detailing are described in the following table.

Inventory Status	Comments
Child Dependency	Select a color to denote child dependencies in the Function Space Diary.
Detail Reserved	Select a color to denote detailed functions and subfunctions in the Function Space Diary.

Note: It is recommended that you select colors for child functions and dependencies that are different from the colors for parent functions and dependencies, so that parent and child items will look different in the Function Space Diary.

Defining Setup Style Translations for Function Spaces

The Setup Style Translation view allows the administrator to specify the required area for each attendee for previously defined setup styles. This translation table is used during the process of generating quotes to start function space availability checks.

This task is a step in *Process of Defining Day Parts, Status Indicators, and Setup Style Translations*.

To define setup style translations for a function space

1. Navigate to the Function Space Administration screen, then the Set Up Style Translation view.
2. In the Set Up Style Translation list, click New.
3. In the new record, select a predefined setup style, and define the Approximate Square Feet or Square Meters required for each attendee.

   These fields are mutually exclusive; filling one automatically converts and populates the other field.
4. If applicable, add comments, and then save the record.

Setting User Properties for the Function Space Diary

Administrators can set user properties to modify or enhance the Function Space Diary views in Siebel Hospitality. For more information about these user properties, see *User Properties for Function Space Diary*.

This task is a step in *Process of Defining Day Parts, Status Indicators, and Setup Style Translations*.

10 Setting Up Charge Codes, Taxes, and Service Charges

Setting Up Charge Codes, Taxes, and Service Charges

This chapter describes how to associate charge codes, taxes, and service charges with a property. It includes the following topics:

- *About Hospitality Charge Codes, Taxes, and Service Charges*
- *Process of Setting Up Charge Codes, Taxes, and Service Charges*
- *Administering Revenue Categories*
- *Associating Revenue Categories with Products*
- *Administering Service Charges*
- *Administering Tax Codes*
- *Administering Charge Codes*
- *Viewing Property-Specific Taxes and Service Charges*

About Hospitality Charge Codes, Taxes, and Service Charges

In Siebel Hospitality, taxes are associated with properties because different properties have different taxes that are regulated by geographic location. However, taxes might also be shared by multiple properties in the same vicinity. Taxes are associated with service charges because some service charges might be subject to federal, state, or county tax. Charge codes are the mechanism by which taxes and service charges are associated with products. Each charge code consists of a group of taxes, service charges, or both that are applied to a product based upon the revenue subcategory of the product and the type of the event.

Charge codes can be associated with multiple taxes and multiple service charges. Service charges can also be associated with multiple taxes and multiple properties. Taxes, in turn, can be associated with multiple properties.

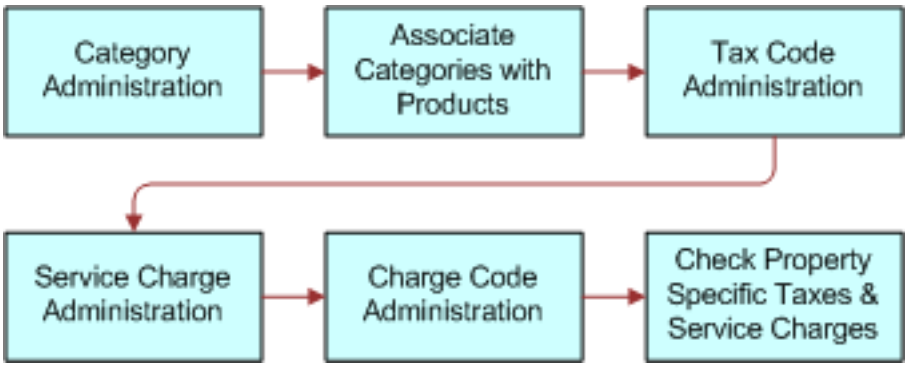
The process of defining charge codes, taxes, and service charges makes it possible for an event manager to choose a product for an event and have charge codes, taxes, and service charges automatically assigned to the line items. For example, a charge code can be associated with two taxes (one for Berkeley and one for Los Angeles) and with two service charges (one that is taxable and one that is not).

An administrator can define taxes with their applicable properties, set up service charges and the taxes and properties that are applicable to them (a service charge might be taxed), and create charge codes using a set of administrative screens and views.

Process of Setting Up Charge Codes, Taxes, and Service Charges

This topic outlines the procedures that administrators typically perform to set up charge codes, taxes and service charges using Siebel Hospitality. Your company might follow a different process according to its business requirements.

The following image illustrates the tasks administrators typically perform to set up taxes, service charges and charge codes.



To set up taxes, services charges, and charge codes, administrators typically perform the following tasks:

- *Administering Revenue Categories*
- *Associating Revenue Categories with Products*
- *Administering Service Charges*
- *Administering Tax Codes*
- *Administering Charge Codes*
- *Viewing Property-Specific Taxes and Service Charges*

Administering Revenue Categories

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

- Creating Revenue Parent Categories
- Creating Revenue Categories
- Creating Revenue Subcategories

For more information on these tasks, see *Process of Creating the Hospitality Revenue Category Hierarchy*.

Associating Revenue Categories with Products

After parent revenue categories, revenue categories and revenue subcategories are defined, the administrator can associate the categories with hospitality products and charge codes.

This task is a step in *Process of Setting Up Charge Codes, Taxes, and Service Charges*.

To associate revenue categories with products

1. Navigate to the Administration - Product screen, then the Products view.
2. In the products list, query for and select the required product.
3. In the product record, select the appropriate value in the Revenue Subcategory field.

   The Revenue Category and Revenue Parent Category fields are automatically populated.
4. Save the product record.

Administering Service Charges

This topic covers the following subjects, and is a step in *Process of Setting Up Charge Codes, Taxes, and Service Charges*.

1. *About Administering Service Charges*
2. *Creating a Service Charge*
3. *Associating a Service Charge with a Property*

About Administering Service Charges

Service charges are associated with a specific property, and they are only included in the calculation for a product if the following conditions exist:

- The service charge is associated with both a charge code linked to the Business Type (local or group) of an event quote and the revenue subcategory of the product.
- The service charge is applicable at the property where the event is being held.

Service charges and taxes are time-dependent; both have a start date and an end date. Service charge and tax date applicability is based on when the function with which the line item is associated occurred. Because multiple functions can be associated with each order and these calculations are performed on an order basis, service charges and taxes might be different for different functions on one order. For example, one function occurs on 12/31/08 and another occurs on 1/1/09. A new set of taxes and service charges become effective at the beginning of the new year. If a function spans two days, then the tax applicability date is the first day.

A service charge is a fee applied to a product or service. An administrative fee is a type of service charge specific to a property. For example, an energy fee is an administrative fee that is added to a room charge. Service charges can be taxable, depending on the tax regulations for the property. Taxes are usually associated with service charges at the time the service charge is defined, although the tax can be added a later date.

There are two levels of visibility for Service charges as follows:

- **All Service Charges.** This view is used to manage all service charges for a particular property. This view would be used by a property revenue manager at a specific property to manage the service charges for the property with which the user is associated.
- **All Service Charges Across Properties.** This view is used to manage all service charges for all properties in the chain of properties belonging to your organization. This view would be used by a corporate property revenue manager to manage service charges for all properties.

Creating a Service Charge

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

This task is a step in *Administering Service Charges*.

To create a service charge

1. Navigate to the Tax Service Admin screen, then the Service Charges List view.
2. In the Service Charges list, create a new record and complete the fields.

   Some of the fields are described in the following table.

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

Field	Comments
Name	The name of the service charge.
Description	The description of the service charge.
Percent	Service charge expressed as a percentage. The service charge amount is calculated from this percent value multiplied by the price for the line item.
Amount	Service charge expressed as a flat fee. The flat fee is a preset amount.
Start Date	Date the service charge becomes active.
End Date	Date the service charge becomes inactive.
Currency	The monetary unit of measure.
Taxable	Check box that indicates whether or not the service charge is taxable.

Field	Comments
City	City in which the service charge applies. A service charge might apply in many different cities, depending on the associated properties.
State	State in which the service charge applies. This field is automatically populated when the City field is completed.

3. Save the record.
4. If the service charge is taxable, click the link in the Name field, and select the Taxes view tab.
5. In the Taxes list, create a new record, and from the Add Taxes dialog box, select the tax, and then click OK.

> **Note:** The Taxable flag is for informational purposes only.

Associating a Service Charge with a Property

Use the following procedure to associate a service charge with a property.

This task is a step in *Administering Service Charges*.

To associate a service charge with a property

1. Navigate to the Tax Service Admin screen, then the Service Charges List view.
2. In the Service Charges list, query for the required service charge.
3. Click the link in the Name field, and select the Properties tab.
4. In the Properties list, create a new record.
5. In the new record, click the single select button in the Name field, select a property, and save the record.

   The remaining fields are automatically populated with the property information.

Administering Tax Codes

This topic covers the following subjects, and is a step in *Process of Setting Up Charge Codes, Taxes, and Service Charges*.

1. *About Administering Tax Codes*
2. *Creating a Tax Code*
3. *Associating a Tax Code with a Property*
4. *Associating Tax Codes with Service Charges*

About Administering Tax Codes

Taxes on a hospitality product can be a flat amount (for example, $5) or a percentage, and have defined effectivity dates. Taxes are defined on a global basis and are later associated with individual properties. Using charge codes, the calculation of taxes is based on the products associated with an order. When a flat tax is calculated during the Trial

Check or Post Check process, the flat amount (for example, $2) is applied to each quantity of the product used. For more information about event checks, see *Generating Event Checks*.

An occupancy tax is a flat tax assessed for room usage. For example, if a group uses Salon C, then a tax of $100 is levied regardless of the size of the group.

Service charges and taxes are time-dependent; both have a start date and an end date. Service charge and tax date applicability is based on when the function with which the line item is associated occurs. Because multiple functions might be associated with each order and these calculations are done on an order basis, service charges and taxes might be different for different functions on one order.

For example, a function might be held on 12/31/08 and another on 1/1/09, and a new set of taxes and service charges are effective on 01/01/09. If a function spans two days, then the tax applicability date is the first day. For more information about setting up service charges, see *Administering Service Charges*.

Taxes must be defined before they can be associated with charge codes, service charges, and properties. There are two levels of visibility for taxes:

- **All Taxes.** This view is used to manage all taxes for a particular property. This view would be used by a property revenue manager at a specific property to manage the taxes for the property with which the user is associated.
- **All Taxes Across Properties.** This view is used to manage all taxes for all properties in the chain of properties belonging to the organization. This view would be used by a corporate property manager to manage taxes for all properties.

Creating a Tax Code

Use the following procedure to create tax codes.

This task is a step in *Administering Tax Codes*.

To create a tax code

1. Navigate to the Tax Service Admin screen, then the Tax List view.
2. In the Taxes list, create a new record, and complete the fields.

   Some of the fields are described in the following table.

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

Field	Comments
Name	The name of the tax.
Percent	The tax defined as a percentage. The amount of tax charged is the percent value multiplied by the price for the line item.
Amount	Tax defined as a flat fee. The flat fee is a preset amount.

Field	Comments
Start Date	The date the tax becomes active.
End Date	The date the tax becomes inactive.
Currency	The currency of the tax. Default value is the default currency of the application.
City	City in which the tax applies. A tax might apply in many different cities depending on the associated properties.
State	State in which the tax applies. This field is automatically populated when the City field is completed.

Associating a Tax Code with a Property

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

This task is a step in *Administering Tax Codes*.

To associate a tax code with a property

1. Navigate to the Tax Service Admin screen, then the Tax List view.
2. In the Taxes list, query for the tax code, and click the link in the Name field.
3. In the Properties list, create a new record.
4. In the Add Properties dialog box, select the property to associate with the tax, and then click OK.

   The remaining fields are automatically populated with the property information.

   Repeat Step 3 through Step 4 of this procedure until all applicable taxes are associated.

Associating Tax Codes with Service Charges

If service charges are taxable, the administrator must associate the service charge codes with the tax codes.

This task is a step in *Administering Tax Codes*.

To associate a tax code with a service charge

1. Navigate to the Tax Service Admin screen, then the Service Charge List view.
2. In the Service Charges list, query for the required service charge record,
3. Click the link in the Name field, and then click the Taxes view tab.
4. In the Taxes list, click New, select the tax code, and save the record.

The remaining fields are automatically populated with the tax code information.

5. Repeat this task for each tax code that must be associated with the service charge.

Administering Charge Codes

This topic covers the following subjects, and is a step in *Administering Tax Codes*.

1. *About Administering Charge Codes*
2. *Defining Charge Codes*
3. *Associating Charge Codes with Tax Codes*
4. *Associating Charge Codes with Service Charges*
5. *Reviewing Charge Codes for a Revenue Category*

About Administering Charge Codes

Charge codes are collections of tax codes and service charges. A charge code is an identifier that links taxes and service charges to products and can be used to distinguish between group and local business. For more information about tax codes, see *Administering Tax Codes*. For more information about service charges, see *Administering Service Charges*.

For each charge code, there is an associated business type. The business type is selected at the event/quote level. The predefined business types are:

- **Group.** Overnight stays for event participants are included with the event.
- **Local.** Overnight stays for event participants are not included with the event.

Note: Additional business types can be added.

Charge codes are associated with subcategories, rather than categories, and can be used for calculation and analysis purposes. When defining charge codes, the Revenue Category field is automatically populated when the Revenue Subcategory field is specified.

Additional charge codes can be defined by extending the List of Values (LOV). For more information about working with the LOV, see *Siebel Applications Administration Guide* .

Defining Charge Codes

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

This task is a step in *Administering Charge Codes*.

To define a charge code

1. Navigate to the Tax Service Admin screen, then the Charge Code List view.
2. In the Charge Codes list, create a new record, and complete the required fields.
3. In the More Info form, complete additional fields, and then save the record.

   The following table describes some of the fields.

Field	Comments
Revenue Category	A group of related products. This field is automatically populated when you enter the Revenue Sub Category.
Business Type	The type of business of the customer organization. Choices are group and local.
End Date	The date the charge code becomes inactive.
General Ledger Number	An identifier that maps the charge code to the general ledger.
Revenue Subcategory	A revenue subcategory allows you to group products more precisely within a larger revenue category and assign different taxes to each revenue subcategory. For example, Appetizers can be a revenue subcategory of the revenue category Food.
Start Date	The date the charge code becomes active.

Repeat Step 2 through Step 3 for each charge code.

Associating Charge Codes with Tax Codes

Perform the steps in the following procedure to associate a charge code with a tax code.

This task is a step in *Administering Charge Codes*.

To associate a charge code with a tax code

1. Navigate to the Tax Service Admin screen, then the Charge Code List view.
2. In the Charge Codes list, query for and select the required charge code.
3. Click the Taxes view tab.
4. In the Taxes list, click New.
5. In the Add Taxes dialog box, select the tax to associate with the charge code, and click OK.
6. Save the record.

   The remaining fields are automatically populated with the property information. Repeat Step 4 through Step 5 for each service charge to associate with the charge code.

Associating Charge Codes with Service Charges

Perform the steps in the following procedure to associate a charge code with a service charge.

This task is a step in *Administering Charge Codes*.

To associate a charge code with a service charge

1. Navigate to the Tax Service Admin screen, then the Charge Code List view.
2. In the Charge Codes list, query for and select the required charge code.
3. Click the Service Charges view tab.
4. In the Service Charges list, click New.
5. In the Add Service Charge dialog box, select the service charge to associate with the charge code.
   The remaining fields are automatically populated with the property information. Repeat Step 4 through Step 5 for each tax to associate with the charge code.

Reviewing Charge Codes for a Revenue Category

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

This task is a step in *Administering Charge Codes*.

To review charge codes for a revenue category

1. Navigate to the Revenue Category Administration screen, then the Category Admin List view.
2. In the Category Admin list, query for and select the required revenue parent category, and then click the link in the Name field.
3. Scroll down, and select the required revenue category in the Revenue Categories list.
4. Scroll down, and click the Charge Codes tab.
   The Charge Codes list displays all the charge codes associated with the revenue category record.

Viewing Property-Specific Taxes and Service Charges

Users can view property-specific taxes and service charges after completing the procedures described in the image in *Process of Setting Up Charge Codes, Taxes, and Service Charges*.

This task is a step in *Administering Charge Codes*.

To view property-specific taxes

1. Navigate to the Property screen, then the Properties view.
2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field.
4. Click the Taxes view tab.
   The Taxes list displays all the taxes associated with the property record. This is a read-only view.

To view property-specific service charges

1. Navigate to the Property screen, then the Properties view.

2. In the Properties list, query for and select the required property record.
3. Click the link in the Property Name field.
4. Click the Service Charges tab.

   The Service Charges list displays all the service charges associated with the property record. This is a read-only view.

11 Setting Up Pricing and Property Pricing

Setting Up Pricing and Property Pricing

This chapter describes administrator procedures for setting up pricing of products and properties. It includes the following topics:

- *About Pricing and Property Pricing*
- *Process of Setting Up Product and Property Pricing*
- *Setting Up Price Lists*
- *Administering Property Pricing*
- *About the Property Pricing Profile*
- *Creating a Property Pricing Profile*
- *Defining Weekday and Weekend Days*
- *Defining a Profit Series and Percentages*
- *Defining Future Date Adjustments for Revenue Categories*
- *Setting Up Special Dates*
- *Administering Function Space Pricing*
- *Accessing the Function Space Calendar*
- *Administering Sleeping Room Pricing*
- *Accessing the Sleeping Room Calendar*
- *Setting Up Controls for Function Spaces, Catering Products, and Sleeping Rooms*
- *Administering Discount Pricing*
- *Setting Up Full Day Discounts for Function Spaces*
- *Setting Up Volume Discounts*
- *Setting Up a Matrix Series*
- *Setting Up Suite Pricing for Multipurpose Spaces*

About Pricing and Property Pricing

Event sales representatives and revenue managers are responsible for setting prices for products and services that are sold to individuals and groups requiring sleeping rooms, function space, and catering products at a property.

Prices quoted to customers vary by property, product type, customer, date, day or week, day part, number of nights required, and other factors. The property must establish the base prices for sleeping rooms, function space, and other ancillary products (for example, food and beverages or use of audiovisual equipment) that are sold during an event.

Event quotes that are furnished to the customer for anticipated goods and services include prices derived from a rules-based pricing system that relies on predefined data. Further negotiations with the customer results in a finalized quote (with price overrides) that is converted into an order.

Hospitality pricing administration typically consists of three processes:

- Pricing data management and pricing administration
- Opportunity, quote, and order pricing
- Revenue management and profitability analysis

Property Pricing Visibility

The users who must have access to the Property Pricing views are:

- **Property Revenue Managers.** Revenue managers of a property can only see their own rates.
- **Regional Revenue Managers.** Revenue managers of a Cluster of properties can see data for multiple properties for which they are responsible.
- **Corporate Revenue Managers.** Corporate managers are able to see data at a national level for multiple properties.

Process of Setting Up Product and Property Pricing

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

To set up product and property pricing, perform the following tasks:

1. *Setting Up Price Lists*
2. *Administering Property Pricing*
3. *About the Property Pricing Profile*
4. *Defining a Profit Series and Percentages*
5. *Defining Future Date Adjustments for Revenue Categories*
6. *Setting Up Special Dates*
7. *Administering Function Space Pricing*
8. *Accessing the Function Space Calendar*
9. *Administering Sleeping Room Pricing*
10. *Accessing the Sleeping Room Calendar*
11. *Administering Discount Pricing*
12. *Setting Up Full Day Discounts for Function Spaces*
13. *Setting Up Volume Discounts*
14. *Setting Up a Matrix Series*
15. *Setting Up Suite Pricing for Multipurpose Spaces*

Setting Up Price Lists

An administrator can create price lists to set prices for event order line items. Each price list can specify more than one kind of pricing, for example, list price, promotional price, and so on.

Using Siebel Hospitality, price lists can be set up for use by properties. When you create a price list, it can be associated with a property and can be used to price products associated with that property. Orders are typically associated with the default price list of the property.

This task is a step in *Process of Setting Up Product and Property Pricing*.

To set up a price list

1. Navigate to the Administration - Pricing screen, then the Price Lists view.
2. In the Price Lists list, create a new record and enter a value in the Name field.
3. In the new record form, click the Show More button, complete the fields and save the record.

   The following table describes some of the fields.

Field	Comments
Aggregate Discount Sequence	Specify the Aggregate Discount Sequence for all the line items associated with the price list. For more information about setting up aggregate discounts, see *Siebel Pricing Administration Guide* .
Cost List	Select the cost list to associate with this price list. For more information about cost lists, see *Siebel Pricing Administration Guide* .
Currency	The currency of the price list. The field is automatically populated and Default value is the currency of the application when a new price list is created.
Description	Description of the price list.
Effective From	The beginning date the price list is in effect. The current date and time is automatically populated by default when a new price list is created.
Effective To	The last date the price list is in effect. After this time, orders, line items, and so on relying on this price list cannot access data in this price list.
Name	The name of the price list.
Organization	Set this field to the property associated with the price list. **Note:** If you do not select a property in this field, the price list will not be associated with any property.
Payment Terms	Select one default set of payment terms to be associated with this price list. This selection appears as the default data for Payment Terms when a user creates a Quote

Field	Comments
	or Order using this price list. For more information about payment terms, see *Siebel Pricing Administration Guide* .
Pricing Procedure	Select a custom pricing procedure. The pricing logic in this procedure will be applied to all the line items in the price list. For more information about pricing procedures, see *Siebel Pricing Administration Guide* .

4. Select the new price list record and click the link in the Name field.
5. In the Price List Line Items list, click New and add a product to the price list.

   Note: The following steps assume the products are already defined. If not, see *Process of Setting Up Hospitality Products*.

6. Add a minimum and maximum price for the price list line item in the Minimum Price and Maximum price fields.
7. Provide information in the remaining fields of the Price List Line Items list.

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

Repeat Step 5 through Step 7 for each product you add.

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

Administering Property Pricing

The property pricing administration business process includes all the tasks that the property revenue managers must complete to set up all the prices for their property.

The tasks necessary for property pricing administration are:

- *Creating a Property Pricing Profile*
- *Defining Weekday and Weekend Days*
- *Defining a Profit Series and Percentages*
- *Defining Future Date Adjustments for Revenue Categories*
- *Administering Function Space Pricing*
- *Administering Sleeping Room Pricing*
- *Administering Discount Pricing*
- *Setting Up a Matrix Series*
- *Setting Up Suite Pricing for Multipurpose Spaces*

About the Property Pricing Profile

The revenue manager sets up the property pricing profile. The profile defines the pricing parameters for each property record. These parameters include:

- Nonparticipating Properties
- Weekend/Weekday
- Price Lists

Nonparticipating Properties Pricing

Nonparticipating properties are properties that do not use the Hospitality Event Sales Execution or Function Space Inventory processes. However, events for these properties might be sold by a member of the property brand and the National Sales Organization (NSO). Event Booking Centers sell space from and pass event opportunities to nonparticipating properties.

For a nonparticipating property, availability and pricing checks are bypassed during the generate quote process. This means that it is not necessary to perform pricing for nonparticipating properties. For more information about nonparticipating properties, see *Managing Nonparticipating Properties*.

Weekend and Weekday Properties Pricing

Some properties quote different rates for weekends as compared to weekdays and as a result, two different weighted average rates can be quoted to the customer. The administrator can define these properties by checking the Weekend/Weekday flag.

These properties implement business rules that price room rates for weekdays differently than room rates on the weekends because the guest profile on weekdays (typically business travelers) is different from the guest profile on the weekends (typically leisure travelers). Weekday and weekend pricing administration involves identifying the days that are priced using weekday rates, and days that are priced using weekend rates. Days defined as weekend days do not have to be consecutive, and the weekend day might include additional price adjustments on the room rate.

The location of the property is also a key factor in pricing room rates for weekends and weekdays. For example, a property located near a theme park such as Disney World might have different room rates for weekends and weekdays than another property in the same metropolitan area, but located near a financial district.

Creating a Property Pricing Profile

Existing price lists must be associated with the properties using the Property Pricing screen. The revenue manager typically sets up the property pricing profile, which establishes the pricing parameters for each property record. The following procedure details how to create a property pricing profile.

This task is a step in *Process of Setting Up Product and Property Pricing*.

To create a property pricing profile

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. In the property record, set the values for the pricing parameters:
   - Non Participating
   - Weekend/Weekday
   - Currency
   - Price List

Defining Weekday and Weekend Days

The property administrator can specify which days are considered to be weekdays and which are weekends for each day of the week. For example, the administrator can define Friday as a weekend day, define Saturday as a weekday, and then set Sunday as a weekend day. To define weekends and weekdays, you must select the Weekend/Weekday check box flag in the Property record.

This task is a step in *Process of Setting Up Product and Property Pricing*.

To define weekday and weekend days

1. Navigate to the Property Pricing Admin, then the Properties view.
2. In the Properties list, select the property and then click the link in the Property Name field.
3. Click the Weekend Admin view tab.
4. In the Weekend Admin list, select a weekday, and select the check box if the day is considered to be a weekend. If the day is not flagged as a weekend day, it is designated as a weekday.

Note: If you select the Weekday-Weekend check box on the property record, the weekend will be defined as Saturday and Sunday by default.

Defining a Profit Series and Percentages

The administrator or revenue manager can define a Profit Series that manages different profit percentages for different periods for each property. The Profit Percentage that is applied to an opportunity depends on the arrival day specified in the opportunity. The profit series is applied to any opportunity that falls within the start and end date of the profit series. In cases where the profit series has overlapping dates, the last date entered takes precedence.

This task is a step in *Process of Setting Up Product and Property Pricing*.

To define a profit series and percentages

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the property and click the link in the Property Name field.

3. Click the Profit Series view tab.
4. In the Profit Series list, create a new record.
5. In the new record enter a name, the start and end dates of the Profit Series, and a description.
6. With the Profit Series record selected, scroll down to the Profit Percentage list.
7. To populate the Profit Series list with all parent revenue categories, click Parent Revenue Category. Otherwise, click New to add individual categories.
8. Set the percentage profit to be made from each parent revenue category at the property.

Defining Future Date Adjustments for Revenue Categories

Property administrators can define future date adjustments on the pricing of revenue categories. This means at a certain date in the future, the prices of all products in a certain category will increase by the defined percentage. This markup is rolled up into each individual quote when the quote price is calculated.

This task is a step in *Process of Setting Up Product and Property Pricing*.

To define a future date adjustment for a revenue category

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the property and click the link in the Property Name field.
3. Click the Future Date Adjustment view tab.
4. In the Future Date Adjustments list, create a new record.
5. In the new record, complete the fields and save the record.
   The following table describes some of the fields.

Field	Comments
Name	The name of the adjustment to be applied.
Revenue Category	The category to which the adjustment is to be applied. **Note:** You must select a category in this field or the adjustment will not be applied.
Revenue Parent Category	This field is automatically populated when the Revenue Category field is completed.
Start Date	The date from which the future date adjustment is to be applied.
Start Day	This field is automatically populated when the Start Date field is completed.
End Date	The date on which the future date adjustment is no longer valid.

Field	Comments
End Day	This field is automatically populated when the End Date field is completed.
% Markup	The percentage increase on all products in the category.

Setting Up Special Dates

Siebel Hospitality provides you with the ability to flag special dates that must be acknowledged by an administrator when setting up pricing. Individual days or date ranges can be flagged as special dates. These dates can be occasions where extra function space or sleeping rooms are required for an event; they can be holidays or special events; or they can be dates flagged with sell notes or part of a particular sales strategy.

Special dates are typically set up by revenue managers. Flagging certain days as special dates for a property alerts sales representatives that the revenue manager wants to generate extra revenue on the days in question. More than one special date for each day can be set up at the property.

Special date can be viewed in the Function Space Calendar and Sleeping Room Calendar. For more information, see *Accessing the Function Space Calendar* and *Accessing the Sleeping Room Calendar*.

This task is a step in *Process of Setting Up Product and Property Pricing*.

To set up a special date

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, query for the required property record.
3. Drill down on the Property Name hyperlink.
4. From the Property form, click the Sell Notes view tab.
5. In the Sell Notes list, create a new record, and complete the fields.

   Some of the fields are described in the following table.

Field	Comments
Start Date	Start date of the special dates period. You can drill down on the link in the Start Date field to navigate to the Special Dates Calendar. For more information about the Special Dates Calendar, see *Viewing the Property Calendar*.
End Date	End date of the special dates period.
Type	Select the type of special date. You can select one of the following: Need Function Space, Need Sleeping Rooms, Sell Notes, Holiday, Sales Strategy, and Special Events.

Field	Comments
Description	Description of the special dates period.
Created By	The User Id of the user who created this special date record.
Created Date	The date on which this special date record was created.
Last updated By	The User Id of the user who last updated this special date record.
Last Updated Date	The last date on which this special date record was updated.

Administering Function Space Pricing

An administrator or a property revenue manager can define benchmark rental fees for function space room types, and specify pricing exceptions for these functions. The administrator or manager must set up the defaults for daily rentals and then define any day part exceptions.

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

The property revenue managers must complete some setup tasks for the function space pricing of the property. These tasks include the following:

1. *Setting Up Pricing Day Parts*
2. *Defining Function Space Pricing Rules*
3. *Setting Up Average Values and Function Types*
4. *Marking Function Spaces as Unavailable or Out Of Order*

These tasks are steps in *Administering Function Space Pricing*.

Setting Up Pricing Day Parts

Day parts are used for rental and threshold calculations for function spaces. Either the administrator or the property revenue manager must segment the operational day into periods of time for threshold and rental calculations to work. To set up day parts for the property, see *Defining Property Day Parts*.

This task is a step in *Administering Function Space Pricing*.

Defining Function Space Pricing Rules

Function space pricing rules must be defined for each function space for quote prices to be generated. The pricing rules provide both the benchmark and threshold pricing for each day part and each day of the week. The benchmark rental price for a function space is the normal price at which the function space is rented out to a customer.

Some hospitality companies only accept function space business when an event on their properties meets a required amount of profit. This profit threshold is used to qualify an event opportunity according to the profit potential of the event. Thresholds indicate how much profit must be made to complete the booking. The aggregate function profit of the quote must be compared with the threshold defined for the function space for the indicated time period. If the quote falls short of the minimum threshold, the sales representative cannot change the quote status to anything higher than prospect. Any inventory being held is released after a predefined time interval if the function status is still at Prospect.

When setting up prices for function spaces, the administrator first sets up the default rates and then creates exception pricing.

This task is a step in *Administering Function Space Pricing*.

Creating Default Function Space Pricing Rules

The following procedure details how to create the default function space pricing rules.

To create default function space pricing rules

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Function Space view tab.
4. In the Function Space list create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Function Space	Select a function space to which this rule will apply.
Start Date	The date from which this rule will apply.
Start Day	This field is automatically populated when the Start Date field is completed.
End Date	The date on which this rule will no longer apply. There is some validation on the Start and End Dates as follows: `End Date >= Start Date + 365` This means that a function space pricing rule can only run for one year at the most.
End Day	This field is automatically populated when the End Date field is completed.

Field	Comments
Day Part	The day part for which this rule is applicable. You must create an individual rule for each day part.
Type	The type of pricing rule, that is, whether the rule is a benchmark rental rule or is a threshold rule. You must create a set of Rental rules (that is, a rental rule for each day part) and a set of Threshold rules.
Cascade	Select to apply this rule to all components (or specific spaces) of category or suite functions spaces. Selecting this check box means that you do not have to create a separate rules list for each specific space associated with the category or suite. This check box is enabled only for Categories and Suites. This check box is read-only for specific spaces.
Monday - Sunday	These fields represent: o The benchmark rental price of the function space for each day of the week or o The profit threshold for each day of the week If the pricing rule runs for less than one week, then it will only be possible to edit the fields for the relevant days.
Comments	Comments on the rule.

5. After you have created a pricing rule, click Apply. The Function Space Pricing Controls list is populated with the rules that you have created. Multiple rules can be applied at once by multi-selecting them and clicking Apply.

   You can make direct changes to the prices in the Pricing Controls list. These prices take precedence over the originally created rules.

Note: If you make changes to the function space pricing rules in the Function Spaces list, you must click Apply after making the changes to make sure that they are reflected in the Pricing Controls list.

Creating Exceptions to the Default Function Space Pricing Rules

Administrators sometimes define exceptions to the pricing of a function space. For example, during certain busy periods, the administrator might increase the price of the function space, but allow the price to revert to the benchmark rental rate after the busy period is over. An administrator can define an exception by creating a rule that has effective start and end dates. This new rule takes precedence over the existing rule when the quote price is calculated.

To create exceptions to the default function space pricing rules

1. In the Function Space list, create a new record with similar values to the rule for which to create an exception.
2. Set the Start Date and End Date fields, and the rental price from Monday to Sunday as appropriate.

3. Click apply. The new rule appears in the Function Space Pricing Controls list.

Setting Up Average Values and Function Types

Average values define how much a property usually receives in revenue for a function similar to the one the customer is planning on holding. Projected revenue is derived from the average values of a property.

In the hospitality industry, events might be planned two or three years into the future. The customer might not have all the details for each function, but only macro-level details. By comparing these macro-level details, each hotel chain can analyze the historical records to determine the average amount of money spent by the customer or the average revenue the hotel has received for similar functions.

Average values are based on the following parameters:

- Business type
- Function type
- Date/Day

Depending on the values for these parameters, each property can have different average values.

Function types and Business types are set up globally in the list of values (LOV) through the Administration - Data screen, List of Values view. Afterward, every property can choose a subset of the list of values using the Property Pricing screen.

This task is a step in *Administering Function Space Pricing*.

To set up average values and function types

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the properties list, select the required property record, and click the link in the Property Name field.
3. Select the Function Types view tab, create a new record and complete the fields with values appropriate to the function type.

   The following table describes some of the fields.

Field	Comments
Primary	Select this check box if this is the primary function type for the property.
Name	Select a name from the drop-down list.
Meal Period	Select a meal from the drop-down list if there is to be a meal during this type of function. If you select a Meal Period for this function type, the meal period is automatically chosen with the function type when a property-specific quote is generated.
Description	This field is automatically populated when the Name field is completed.

Field	Comments
Active	Click this check box if the function type is active at this property.

4. Scroll down to the Type - Applicability Time list and create a new record.
5. Complete the following fields:
   - Business Type
   - Start Date
   - End Date

   Note: The Start Day and End Day are automatically populated with the values from Start Date and End Date.
6. Scroll down to the Average Values list.
7. To populate the Average Values list with all revenue categories, click Revenue Category. Otherwise, click New to add individual categories.
8. For each record in the average values list, update the following fields:
   - Average Value
   - UoM
   - Service Charge or Service Charge % (These two fields are mutually exclusive. When you populate one of these fields, the other is immediately overridden.) Setup for these values is done at the property level. For more information, see *Setting Up Charge Codes, Taxes, and Service Charges*. However, you can specify a value here, if necessary, which will override the corresponding value for specific function type or parent revenue value.

Marking Function Spaces as Unavailable or Out Of Order

Function space is considered out of order when there is a physical issue that prevents the property from using the space. For example, if a water pipe breaks, flooding a function space, the function space is flagged as out of order for a specified period of time.

Function space is considered unavailable when the space is being used for other purposes, or the operations management of the property decides that it does not make fiscal sense to have the space available for sale as function space. For example, a hotel restaurant is open for dinner from 4 to 11 P.M. During that period, the restaurant is unavailable for sale as function space because it is being used to serve all the guests of the hotel and the local population. The function space of the restaurant is designated as unavailable from 4 to 11 P.M. each day. However, the space might be available for sale at other times of the day.

Because unavailable and out-of-order function space is a revenue issue, the Property Pricing Admin screen is used. Revenue managers typically designate the function space as out of order and unavailable. When a function space is flagged as unavailable or out of order, then it cannot be included in a quote at the specified time.

This task is a step in *Administering Function Space Pricing*.

To mark a function space as unavailable

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property, and click the link in the Property Name field.

3. Click the Unavailable view tab.
4. In the Unavailable list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Function Space	Select the function space to flag as unavailable.
Booking Type	This field is automatically populated as Unavailable.
Frequency	Select the day on which the function space will be unavailable.
Recur Start Date	The date from which the function space will be unavailable.
Start Day	This field is automatically populated when the Recur Start Date field is completed.
Recur Start Time	The time at which the function space will become unavailable.
Recur End Date	The date from which the function space will no longer be unavailable.
End Day	This field is automatically populated when the Recur End Date field is completed.
Recur End Time	The time at which the function space is no longer unavailable.
Reason	Select a reason why the function space is unavailable. This list of values is administered through the Administration - Data screen, List of Values view.

To mark a function space as out of order

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property, and click the link in the Property Name field.
3. Click the Out of Order view tab.
4. In the Out of Order list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Start Date Time	The date and time from which this function space is out of order.

Field	Comments
Start Day	This field is automatically populated when the Start Date Time field is completed.
End Date Time	The date and time on which this function space will no longer be out of order.
End Day	This field is automatically populated when the End Date Time field is completed.
Reason	Select a reason why the function space is out of order.
Function Space	Select the function space to flag as unavailable.
Booking Type	This field is automatically populated as Out of Order.
Created	The date on which this record was created.
Created By	The User Id of the user who created this record.

Accessing the Function Space Calendar

The function space calendar can be accessed from the Property Pricing Admin screen when you drill down on a property. This calendar allows an administrator to view special dates and sell notes, function space rental by day parts, function space thresholds by day parts, and function space authorization for a particular function space at a property. This view helps the user to see all these related pieces of information for a particular function space. The administrator might find this useful when defining pricing rules. It is possible to drill down to a number of different views when using this calendar as follows:

- By drilling down on the Authorization link, the user is brought to the Inventory Control view tab for the property.
- By drilling down on the Threshold or Rental link, the user is brought to the Function Space view tab, with the particular pricing rule that affects the link in the calendar selected.
- By drilling down on Sell Notes or Special dates, the user is brought to the Sell Notes view tab with the relevant sell note or special date selected.

To access the Function Space Calendar

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property Name field, and then click the Function Space Calendar view tab. The function space calendar is displayed.
4. Select either the weekly or monthly view.

5. In the date field, select the week or month for which to view details.
6. In the Function Space field, select the function space for which to view details.

Administering Sleeping Room Pricing

Administrators control sleeping room pricing administration by setting up a series of pricing rules for each room. These pricing rules can be used to define benchmark rates for each of the different room types, a negotiation floor for sales representatives, minimum and maximum prices for each room type, and also costing rules for each room type. Exceptions to the established rates are typically used to adjust arrival day pricing and pricing exceptions on certain days of the week.

The pricing for different room types varies, according to the following conditions:

- Room type
- Day of the week
- Season
- Special date (overrides)

The pricing for each room type is an individual sleeping room item, or is included in a pricing matrix if matrix-based pricing is used. If a matrix is used, the benchmark room rate for the room type is defined as a line item in the matrix. For information on setting up matrix-based pricing, see *Setting Up a Matrix Series*.

Sleeping Room Pricing Administration is an important business process for the property revenue manager. The revenue manager performs a number of tasks as a part of setting up sleeping rooms. The various tasks that are performed in this process include:

1. *Setting Up Rates for Sleeping Rooms*
2. *Defining Government Sleeping Room Pricing Rules*

These tasks are steps in *Process of Setting Up Product and Property Pricing*.

Setting Up Rates for Sleeping Rooms

When setting up rates for sleeping rooms, the administrator first sets up the default rates and then creates exception pricing.

This task is a step in *Administering Sleeping Room Pricing*.

Creating Default Sleeping Room Pricing Rules

The administrator defines the default sleeping room pricing types and then sets the rate for each type. The defined rates apply to the sleeping room types when the active flag is set.

To create default sleeping room pricing rules

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Sleeping Room view tab.
4. In the Sleeping Room list create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Sleeping Room	Select the sleeping room for which a rule is to be defined.
Start Date	The date from which this rule will apply.
Start Day	This field is automatically populated when the Start Date field is completed.
End Date	The date on which this rule will no longer apply. There is some validation on the Start and End Dates as follows: `End Date >= Start Date + 365` This means that a function space pricing rule can only run for one year at the most.
End Day	This field is automatically populated when the End Date field is completed.
Rule Type	Select the appropriate rule type. There are six types as follows: o **Benchmark.** The price at which the room is generally rented. o **Floor (Negotiation Floor).** The variance from the benchmark room price below which a sales representative cannot negotiate prices for the room. For example, if the benchmark room price is 90 dollars, and the Floor is 20 dollars, then the sales representative cannot negotiate a price less than 70 dollars for the room. o **Floor %.** Indicates the percentage variance from the benchmark room price below which a sales representative cannot negotiate prices for a room. Define either a Floor rule or a Floor % rule for each sleeping room type. o **Minimum.** The minimum price at which a room can be rented. o **Maximum.** The maximum price at which a room can be rented. o **Cost.** Revenue Managers can define the costs associated with each sleeping room type at the property. The values entered are used to calculate the sleeping room profit. The calculation is based on the arrival date of the event. If the cost is defined for a date range, it is used to calculate the profit for all event opportunities scheduled to arrive within the date range. Generally, a set of rules is created for each sleeping room type.
Monday - Sunday	These fields represent the value for each day of the week for the specified rule type. If the pricing rule runs for less than one week, then it will only be possible to edit the fields for the relevant days.
Comments	Comments on the rule.

5. When you have created all the necessary pricing rules, click Apply. The Sleeping Rooms Pricing Controls list is populated with all the rules that you have created.

You can make direct changes to the prices in the Pricing Controls list. These edited prices will take precedence over the originally created rules.

Creating Exceptions to the Default Sleeping Room Pricing Rules

The administrator can define exception rates for each rule type after the rule has been created. An administrator can define an exception by creating a new rule that has effective start and end dates. The newly created rule will take precedence over the existing rule when the quote price is calculated.

To create exceptions to the default sleeping room pricing rules

1. In the Sleeping Rooms list, create a new record with similar values to the rule for which to create an exception.
2. Set the Start Date and End Date fields, and the sleeping room price from Monday to Sunday as appropriate.
3. Click Apply. The new rule appears in the Sleeping Room Pricing Controls list.

Defining Government Sleeping Room Pricing Rules

The administrator can set up sleeping room pricing types and rates that meet government room rate requirements for the government market segment. These mandated rates requirements are regularly published by the U.S. government for each room type.

The prices are date range-specific and are routinely added to Siebel Hospitality for any given property. Government pricing can be turned on and off depending on the government rate availability. While the government rate exists in Siebel Hospitality at all times, this rate might or might not be available depending on the occupancy of the hotel. When government pricing is not available, regular pricing is used.

The government rate cannot be offered to a group unless the government rate is open for every day that the group is resident at the property. That is, if the government rate is not available for a single day of the room block, then the whole room block cannot be offered at the government rate.

The property administrator must define the available (open) dates, and on which dates special rates for the government segment must not be applied. Government rates can vary by the arrival day of the event. For example, current government rates can be specified for a particular date range, and rates that are applicable for the next three years can also be defined.

Exceptions to sleeping room rates for the government sector usually involve defining rates for dates in the future. For example, in October, the government might release prices that are applicable beginning in January of the following year.

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

Setting Up Default Government Rates

The following procedure details how to set up the default government sleeping room rates.

To set up default government rates

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property.
3. In the property record, click the link in the Property Name field.
4. Click the Government Pricing view tab.
5. In the Government Rate list, create records for each sleeping room type, and complete the fields.

For more information about the fields in the Government Rate list, see *Creating Default Sleeping Room Pricing Rules*.

6. Save the record, and click Apply.
7. Scroll down to the Government Open list, and create a new record for each sleeping room type that defines the dates on which the government rates are available.

   The following table describes some of the fields.

Field	Comments
Sleeping Room	Sleeping room for which available dates are to be defined.
Start Date	The date on which the government rates become available. This date must be the same as the date defined for the sleeping room in the Government Rate list.
Start Day	This field is automatically populated when the Start Date field is completed.
End Date	The date on which the government rates are no longer available. This date must be the same as the date defined for the sleeping room in the Government Rate list. There is some validation on the Start and End Dates as follows: `End Date >= Start Date + 365` This means that a function space pricing rule can only run for one year at the most.
End Day	This field is automatically populated when the End Date field is completed.
Monday - Sunday	Click the check box for each day of the week on which the government rates are available. For example, government rates might not be available on Saturday and Sunday nights. If the pricing rule runs for less than one week, then it will only be possible to edit the fields for the relevant days.
Comments	Comments on the rule.

8. Save the record, and click Apply. The Government Sleeping Room Pricing list displays the government rates and indicates the dates and days on which these rates apply.

Creating Exceptions to the Default Government Rates

The administrator can define exception rates for each rule type after the rule has been created, and also define available dates for this exception. An administrator can define an exception by creating a new rule that has effective start and end dates. The newly created rule will take precedence over the existing rule when the quote price is calculated.

To create exceptions to the default government rates

1. In the Government Rate list, create a new record with similar values to the rule for which to create an exception.

2. Set the Start Date and End Date fields, and the rental price from Monday to Sunday as appropriate. Click Apply.
3. In the Government Open list, create a new record that indicates the dates and days on which this exception is valid. Click Apply.
4. In the Government Sleeping Room Pricing list, the exception is applied to the specified dates and days.

Accessing the Sleeping Room Calendar

The sleeping room calendar can be accessed from the Property Pricing Admin screen when you drill down on a property. This calendar allows an administrator to view special dates and sell notes, sleeping room costs, negotiation floor, benchmark rates, government rates, sleeping room authorizations and weekday-weekend properties for a particular sleeping room at a property. This view helps the user to see all these related pieces of information for a particular sleeping room. The administrator might find this useful when defining pricing rules. It is possible to drill down to a number of different views when using this calendar as follows:

- By drilling down on the Authorization link, the user is brought to the Inventory Control view tab for the property.
- By drilling down on the Sleeping Room Cost, Negotiation Floor or Benchmark link, the user is brought to the Sleeping Room view tab, with the particular pricing rule that affects the link in the calendar selected.
- By drilling down on the Government link, the user is brought to the Government Pricing view tab, with the particular pricing rule that affects the link in the calendar selected.
- By drilling down on Sell Notes or Special dates, the user is brought to the Sell Notes view tab with the relevant sell note or special date selected.

To access the Sleeping Room Calendar

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property Name field, and then click the Sleeping Room Calendar view tab. The sleeping room calendar is displayed.
4. Select either the weekly or monthly view.
5. In the date field, select the week or month for which to view details.
6. In the Sleeping Room field, select the sleeping room for which to view details.

Setting Up Controls for Function Spaces, Catering Products, and Sleeping Rooms

When defining pricing for function spaces, catering products, and sleeping rooms, you can set a maximum and minimum price that can be charged for each item. This prevents a sales representative from undercharging or overcharging for a particular item when the quote is generated.

The minimum and maximum pricing controls for function spaces and catering products are defined when you create a price list. For more information about defining minimum and maximum prices for function spaces and catering products, see *Setting Up Price Lists*.

The minimum and maximum pricing controls for sleeping rooms are defined when you set up pricing for sleeping rooms. For more information about defining minimum and maximum prices for sleeping rooms, see *Setting Up Rates for Sleeping Rooms*.

Administering Discount Pricing

There are three types of discount pricing in Siebel Hospitality as follows:

- **Full Day Function Space Discounts.** For more information, see *Setting Up Full Day Discounts for Function Spaces*.
- **Volume Discounts.** For more information, see *Setting Up Volume Discounts*.
- **Matrix-based Discounts.** For more information, see *Setting Up a Matrix Series*.

Setting Up Full Day Discounts for Function Spaces

Administrators can define full day discounts for those customers who book functions that touch every day part for the property, or that touch every day part that is included in the full day threshold. Before full day discounts are defined, the day parts for the property must be defined. When defining the day parts, the administrator can choose to include the day part in the full day threshold. If the administrator does this, then the function must touch this day part if it is to qualify for the full day discount. If the administrator does not choose to include the day part in the full day threshold, then the function does not have to touch the day part to qualify for the full day discount.

To set up full day discounts, do the following:

- *Setting Up Property Day Parts*
- *Defining Full Day Discounts*

This task is a step in *Process of Setting Up Product and Property Pricing*.

Setting Up Property Day Parts

When the administrator sets up the property day parts, it is possible to define those day parts that are part of the full day threshold. For information about setting up property day parts, see *Defining Property Day Parts*.

Defining Full Day Discounts

The following procedure details how to define full day discounts for function spaces after the property day parts have been set up.

To define full day discounts

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the FS Full Day Discount view tab.
4. In the FS Full Day Discount list, create a new record, complete the fields and save the record.

   The following table describes some of the fields.

Field	Comments
Function Space	The function space to which the full day discount will apply.
Start Date	The date from which the full day discount will become effective.
Start Day	This field is automatically populated after the Start Date field is completed.
End Date	The date after which the full day discount is no longer effective.
End Day	This field is automatically populated after the End Date field is completed.
Rule Type	Select Full Day Discount.
Cascade	Select to apply this discount to all components (or specific spaces) of category or suite functions spaces. Selecting this check box means that you do not have to create a separate discount for each specific space associated with the category or suite.
Monday - Sunday	These fields represent the percentage discount on each day of the week. Enter the appropriate percentage discount for each field.
Comments	Enter relevant comments on the discount.

Example of a Full Day Discount

The day has been broken up into five different day parts as follows, with the day parts for full day threshold flagged:

- **Morning.** 7 A.M. until 12 P.M.
- **Afternoon.** 12 P.M. until 5 P.M. Include in Full Day Threshold flag.
- **Evening.** 5 P.M. until 10 P.M. Include in Full Day Threshold flag.
- **Midnight.** 10 P.M. until 3 A.M. Include in Full Day Threshold flag.
- **Night.** 3 A.M. until 7 A.M.

Case 1. A wedding party decides to hold an event between the hours of 12 P.M. and 12 A.M. In this case, the event touches three day parts: Afternoon, Evening, and Midnight. As the data shows, these three day parts are the only day parts with the Include in Full Day Threshold flag selected. Therefore, the event touches all the day parts required for it to qualify for a full day discount.

Case 2. A company decides to hold a conference between the hours of 9 A.M. until 8 P.M. In this case, the event also touches three day parts: Morning, Afternoon, and Evening. However, as the data shows, the event does not touch the Midnight day part, which has the Include in Full Day Threshold flag selected. Therefore, the event will not qualify for the full day discount as it does not touch all the required day parts.

Setting Up Volume Discounts

Administrators can set up volume discounts for customers who purchase a specified volume of a particular catering product or sleeping room. A volume discount is an adjustment to the price of a product or sleeping room based of the quantity of that product contained within the quote line or order line item, or on the quantity of sleeping rooms booked for a particular night. Volume discounts can be associated with a particular property so that all quotes from that property are subject to the same volume discount.

To set up volume discounts, do the following:

- *Creating Volume Discounts*
- *Adding Volume Discount Line Items*
- *Associating Volume Discounts with a Property*
- *Creating Aggregate Volume Discounts for Sleeping Rooms and Suites*

This task is a step in *Administering Discount Pricing*.

Creating Volume Discounts

Volume discounts are created through the Administration - Pricing screen. For more detailed information about how to create a volume discount, see *Siebel Pricing Administration Guide* .

This task is a step in *Setting Up Volume Discounts*.

To create a volume discount

1. Navigate to the Administration - Pricing screen, then the Volume Discounts view.
2. In the My Volume Discounts list, create a new record, complete the fields and save the record.

   Some of the fields are described in the following table.

Field	Comments
Name	Enter a name for this volume discount.
Discount Method	Select the discount method from the picklist. The options are Simple and Tiered. For more detailed information about these methods, see *Siebel Pricing Administration Guide* .
Effective From	The date from which this volume discount will become effective.
Effective To	The date on which this volume discount will become ineffective. If the volume discount will not expire, leave this field blank.

Field	Comments
Exchange Date	If you are converting currencies, enter the date for the currency exchange rate. Siebel Hospitality uses the exchange rate on that date to convert currency.
Description	Enter a description of the purpose of the volume discount.

Adding Volume Discount Line Items

Volume discount line items include information about quantity range and price adjustment for each quantity range for a volume discount. You must add a volume discount for each discount rate in the volume discount. For example, to apply a 10 percent discount when the quantity is 5 to 10, and a 20 percent discount when the quantity is 11 or more, then you must add two volume discount line items. For more detailed information, see *Siebel Pricing Administration Guide* .

This task is a step in *Setting Up Volume Discounts*.

To add volume discount line items

1. Navigate to the Administration - Pricing screen, then the Volume Discounts view.
2. In the My Volume Discounts list, query for and select the required volume discount.
3. Click the Volume Discounts Line Items view tab.
4. In the Volume Discounts Line Items view tab, create a new record, complete the fields, and save the record.

   Some of the fields are described in the following table.

Field	Comments
Name	Enter a name for the volume discount line item.
Min Qty	Enter the minimum quantity that must be purchased to take advantage of this rate.
Max Qty	Enter the maximum quantity that gets this rate.
Adjustment Type	Select the type of adjustment that will apply.
Adjustment Amount	Enter the value of the adjustment. How this works will depend on the option chosen in the Adjustment Type field.

Associating Volume Discounts with a Property

The following procedure details how to associate a predefined volume discount with a property.

This task is a step in *Setting Up Volume Discounts*.

To associate a volume discount with a property

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Volume Discount Matrix view tab.
4. In the Volume Discount Matrix list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the discount at this property.
Description	Enter a description of the discount.
Volume Discount	Select the discount to be associated with this property.
Start Date	The date from which the volume discount will become effective.
Start Day	This field is automatically populated after the Start Date field is completed.
End Date	The date after which the volume discount is no longer effective.
End Day	This field is automatically populated after the End Date field is completed.
Product	Select a product to which the volume discount applies.
Product Line	Select a product line to which the volume discount applies. Select either a product or product line. **Note:** You can only specify either Product or Product Line for any Volume Discount.
Created By	The User Id of the user who created the Volume discount.

Field	Comments
Created Date	The date on which the volume discount was created.

Creating Aggregate Volume Discounts for Sleeping Rooms and Suites

A *sleeping room aggregate volume discount* is a volume discount that applies to all types of sleeping rooms at a specific property. Siebel Hospitality allows you to create aggregate volume discounts for sleeping rooms.

For example, a property has three different types of sleeping rooms (single room, double room, and penthouse suite). A customer books 10 rooms of each type, which means the customer books a total of 30 rooms. Instead of giving a separate discount for each room type, you can give the customer one aggregate discount for all 30 rooms.

Before you perform this procedure, you must create a volume discount, as described in *Creating Volume Discounts*. Additionally, you must add line items to the volume discount, as described in *Adding Volume Discount Line Items*.

To create an aggregate volume discount for sleeping rooms and suites

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Volume Discount Matrix view tab.
4. In the Volume Discount Matrix list, create a new record.
5. In the Product Line field, click the single select button, and in the Pick Product Line selection dialog box, select the Sleeping Room product line.
6. Complete the remaining fields, while making sure that you leave the Product field blank, and save the record. For more information on these fields, see *Associating Volume Discounts with a Property*.

Setting Up a Matrix Series

Using a matrix series, administrators can tailor processes and discounts to specific customer and market segments. They allow for the creation and management of prices and discounts for products in conjunction with customer and market factors.

It is recommended that you use discount matrices for discounts where there are high volumes of prices and adjustments, the discount criteria used for the adjustment are known well ahead of time, and the discount criteria used for the adjustment do not change frequently.

In Siebel Hospitality, discount matrices can be associated with accounts and market segments. For more information about discount matrices, see *Siebel Pricing Administration Guide* .

This task is a step in *Process of Setting Up Product and Property Pricing*.

To set up a matrix series, you must do the following:

- *Creating a Matrix Series for a Property*

- Do one of the following as required:
  - *Defining an Account Matrix Discount*
  - *Defining a Segment Matrix Discount*
- *Modifying Adjustment Amounts for a Matrix Series*

Creating a Matrix Series for a Property

The following procedure details how to create a matrix series record for which an account or segment matrix discount can be defined.

This task is a step in *Setting Up a Matrix Series*.

To create a matrix series for a property

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Matrix Series view tab.
4. In the Matrix Series list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Series Name	Enter a name for the series.
Start Date	The date from which the series will become effective.
Start Day	This field is automatically populated after the Start Date field is completed.
End Date	The date after which the series is no longer effective.
End Day	This field is automatically populated after the End Date field is completed.
Product Line	Select the product line to which this matrix series applies.
Description	Enter a description of the series.

5. You must now create either an account or statement discount for the series.

   For more information, see *Defining an Account Matrix Discount* or *Defining a Segment Matrix Discount* as appropriate.

Defining an Account Matrix Discount

Your company can award discounts to valued accounts that bring a large amount of business to the company. This might act as an incentive for the account to continue using your company for hospitality events.

This task is a step in *Setting Up a Matrix Series*.

To define an account matrix discount

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Matrix Series view tab.
4. In the Matrix Series list, create a new record, as described in *Creating a Matrix Series for a Property*.
5. Scroll down and click the Account Matrix view tab.
6. Create a number of new records as required, complete the fields, and save each record.

   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the account matrix.
Account Name	Select the account to which this matrix will apply.
Parent Account	Select the parent account of the Account to which this discount will apply.
Product	Select the product to which this matrix will apply. Only products that are contained in the Product Line for the Matrix Series will be available for selection here if a Product Line is used for the series.
Frequency	Select the day of the week on which this matrix will apply.
Adjustment Type	Enter the type of adjustment. For information about the selection options, see *About Matrix Discount Adjustment Types*.
Adjustment Amount	The amount of the adjustment that is specified by type.

Defining a Segment Matrix Discount

This task is a step in *Setting Up a Matrix Series*.

To define a segment matrix discount

1. Navigate to the Property Pricing Admin screen, then the Properties view.
2. In the Properties list, select the required property and click the link in the Property Name field.
3. Click the Matrix Series view tab.
4. In the Matrix Series list, create a new record.

   For more information about creating a matrix series record, see *Creating a Matrix Series for a Property*.
5. Click the Segment Matrix view tab.
6. Create a number of new records as required, complete the fields, and save the records.

   The following table describes some of the fields.

Field	Comments
Name	The name of the account matrix. This field is automatically populated.
Opportunity Segment	Select the segment to which this matrix will apply.
Product	Select the product to which this matrix will apply. Only products that are contained in the Product Line for the Matrix Series will be available for selection here if a Product Line is used for the series.
Frequency	Select the day of the week on which this matrix will apply.
Adjustment Type	Enter the type of adjustment. For information about the selection options, see *About Matrix Discount Adjustment Types*.
Adjustment Amount	The amount of the adjustment that is specified by type.

Modifying Adjustment Amounts for a Matrix Series

On occasion, an administrator might want to increase or decrease all the adjustment amounts associated with a matrix series. The administrator can do this using the Transform button.

To modify adjustment amounts for a matrix series

1. Navigate to the Property Pricing Admin screen, Properties, and then the Matrix Series view for the required property record.
2. Select the required series record, and click Transform. The Matrix Transform dialog box is displayed.
3. In the Transform field, enter the amount by which the adjustment amounts must be transformed. For example, to increase adjustment amounts by ten percent, enter 110%, or to decrease adjustment amounts by ten percent, enter 90%.

4. Do one of the following:
    - To apply the adjustment to Price Overrides only, make sure that the Price Override Only check box is selected.
    - To apply the adjustment to all adjustment amounts, make sure that the Price Override Only check box is deselected.
5. Click Transform. The transformation is applied to the adjustment amount fields for Account and Segment matrices.
6. Select the matrix series and scroll down to the Price Details list.
7. In the Price details list, add a record.
8. Complete the fields and save the record.

Repeat Step 7 through Step 8 to create additional Price Details records.

About Matrix Discount Adjustment Types

The Adjustment Type field allows you to specify the type of adjustment to apply to matrix discounts. Selection options are as follows:

- **Discount Amount.** Indicates that a set amount is to be discounted from the product price.
- **% Discount.** Indicates that a set percentage is to be discounted from the product price.
- **Markup Amount.** Indicates that the product price is to be increased by a set amount.
- **% Markup.** Indicates that the product price is to be increased by a set percentage.
- **Price Override.** Indicates that the price of the product is to be overridden to the amount specified in the Adjustment Amount field.
- **Tier Based.** Applies the discount percentage defined by each Volume Discount Line Item record to the quantity of items defined in that Volume Discount Line Item record.
- **Multiplicative Amount.** Multiplies the target price by the specified adjustment value.
- **Power (Target Price, Power).** Raises the target price to the specified exponential value. For example, if the target price is 4, and the adjustment value is 2, the new price will be 4 to the 2nd power (4 * 4) = 16.
- **Round (Current, Decimal Places).** Sets the number of decimal places to which the price will be rounded.

Setting Up Suite Pricing for Multipurpose Spaces

Property revenue managers must set up suite pricing for suites that can act either as a sleeping room or a function space. The rules that govern this are as follows:

- If the suite is reserved as a sleeping room, prices are set up by specifying the rate for each day of the week according to the sleeping room pricing type, and the government sleeping room pricing type. For more information about setting sleeping room pricing, see *Administering Sleeping Room Pricing*.
- If the suite is reserved as a function space, then the pricing is set up by day and day parts with the threshold and rental fee factored in. The property revenue manager creates the function space rental fee records, which are sets of rental value by day and day part. In addition, the property revenue manager sets up the thresholds by day and day part. For more information about setting function space pricing, see *Administering Function Space Pricing*.

- Optionally, you can include all suites that are used as function spaces as part of the sleeping room revenue.

This task is a step in *Process of Setting Up Product and Property Pricing*.

To set up suite pricing for multipurpose spaces

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the required property.
3. Click the link in the Property Name field, and then click the Suite Administration tab.
4. Select the Suite Room Rental check box.

   All suites at the property that are used as function spaces are included as part of the sleeping room revenue.

12 Setting Up Meeting Packages

Setting Up Meeting Packages

This chapter describes how to set up meeting packages. It includes the following topics:

- *About Meeting Packages*
- *Process of Setting Up Meeting Packages (Administrators)*
- *About Meeting Package Price Per Day Calculations*

About Meeting Packages

A *meeting package* is a packaged collection of meeting event essentials that can include meeting rooms, catering, audio-visual equipment, and sleeping rooms. A meeting package encompasses a function agenda, function spaces, and, optionally, nonfunction line items and sleeping rooms. Each meeting package applies to a specific property, and is usually available at a promotional price. A property can have multiple meeting packages that can be applied to specific events.

Meeting packages can accommodate the following types of attendees:

- *Complete meeting package (CMP)* attendees purchase sleeping rooms as part of the package.
- *Day delegate (DD)* attendees do not purchase sleeping rooms as part of the package.

A meeting package can have DD attendees, CMP attendees, or both.

Administrators create and maintain meeting packages and their associated components as generic objects. Administrators can also associate specific components with meeting packages. Subsequently, sales representatives can book meeting packages for specific events at their properties by applying instances of these generic meeting packages to quotes, event orders, and event checks. The booking procedures for sales representatives are described in the chapters that cover quotes, event orders, and event checks.

Process of Setting Up Meeting Packages (Administrators)

This topic lists the procedures that administrators typically perform to set up meeting packages with Siebel Hospitality. Your company might follow a different process according to its business requirements.

To set up meeting packages, perform the following tasks:

- *Creating Meeting Packages*
- *Associating Functions and Function Line Items with a Meeting Package*
- *Associating Nonfunction Line Items with a Meeting Package*

- *Associating Sleeping Room Types and Pricing Intervals with a Meeting Package*
- *Starting Meeting Package Price Per Day Calculations*

Creating Meeting Packages

You can create and edit meeting packages associated with a property that you select. You can create multiple meeting packages for a given property. To create a meeting package, follow this procedure.

This task is a step in *Process of Setting Up Meeting Packages (Administrators)*.

To create a meeting package

1. Navigate to the Property Administration screen, Properties view, and find a property for which you want to create a meeting package.
2. Click the link in the Property Name field.
3. Click the Meeting Packages view tab.
4. In the Meeting Packages list, create a new meeting package, and complete the fields as required.

   Some fields are described in the following table.

Field	Comments
Name	User-defined name for the meeting package. The value in this field must be unique for the current property.
Display Name	Enter a name to be displayed for this meeting package in the Siebel Hospitality user interface.
Type	Type of the record. Read-only. Meeting Package is displayed by default.
Description	User-defined description of the meeting package.
Start Date	The first date on which this meeting package is valid. The current date is the earliest date you can enter.
End Date	The last date on which this meeting package is valid. This date must be equal to or later than the value in the Start Date field. **Note:** You cannot delete meeting packages. To prevent a meeting package from being selected on a quote, set this field to the last day on which to allow this meeting package to be selected.
Min Duration	Minimum duration of the meeting package, in number of days. For information about the validations and requirements applied to this field, see the About Min Duration and Max Duration Field Validations section of this topic.

Field	Comments
Max Duration	Maximum duration of the meeting package, in number of days. For information about the validations and requirements applied to this field, see the About Min Duration and Max Duration Field Validations section of this topic.
Min DD/Day	Minimum number of day delegates for each day of the meeting package. If this field has a value greater than 0, then when the meeting package is booked in a quote, Siebel Hospitality validates that the number of day delegates each day is equal to or greater than the value in this field.
Min CMP/Day	Minimum number of complete meeting package delegates for each day of the meeting package. If this field has a value greater than 0, then when the meeting package is booked in a quote, Siebel Hospitality validates that the number of CMP delegates each day is equal to or greater than the value in this field.
Tax Inclusive	Select to include tax in the meeting package price. Clear to indicate that the meeting package price does not include tax. If this field is selected, then all items in the meeting package are considered to be tax inclusive.
Srv Charge Inclusive	Select to include service charges in the meeting package price. Clear to indicate that the meeting package price does not include service charges. If this field is selected, then all items in the meeting package are considered to be inclusive of service charges.
Single Occ. Offset	The price offset that can be applied to single-occupancy sleeping rooms. If this field has a value greater than 0, then when the meeting package is booked in a quote, Siebel Hospitality calculates the price for single-occupancy rooms, according to the following formula: Single Price plus Single Occ. Offset
Double Occ. Offset	The price offset that can be applied to double-occupancy sleeping rooms. If this field has a value greater than 0, then when the meeting package is booked in a quote, Siebel Hospitality calculates the price for double-occupancy rooms, according to the following formula: Single Price plus Double Occ. Offset
Triple Occ. Offset	The price offset that can be applied to triple-occupancy sleeping rooms. If this field has a value greater than 0, then when the meeting package is booked in a quote, Siebel Hospitality calculates the price for triple-occupancy rooms, according to the following formula: Single Price plus Triple Occ. Offset

Field	Comments
Quad Occ. Offset	The price offset that can be applied to quadruple-occupancy sleeping rooms. If this field has a value greater than 0, then when the meeting package is booked in a quote, Siebel Hospitality calculates the price for quadruple-occupancy rooms, according to the following formula: Single Price plus Quad Occ. Offset

About Min Duration and Max Duration Field Validations

Completing the Min Duration and Max Duration fields is optional. You can enter values in both, either, or neither of the fields. If both the Min Duration and Max Duration fields are populated, then Siebel Hospitality validates that the Min Duration value is less than or equal to the Max Duration value.

When the meeting package is booked in a quote, Siebel Hospitality performs the following validations:

- If the Min Duration field is populated, then when the meeting package is booked in a quote, Siebel Hospitality validates that the value in the Duration (Days) field of the quote is equal to or greater than the value in this field.
- If the Max Duration field is populated, then when the meeting package is booked in a quote, Siebel Hospitality validates that the value in the Duration (Days) field of the quote is equal to or less than the value in this field.
- If Min Duration is equal to Max Duration, then when the meeting package is booked in a quote, Siebel Hospitality validates that the CMP attendance figures each day are the same. In other words, the number of CMP attendees and occupancy values for each room on the quote must be the same for each day of the event.

The TNT Apply Package Workflow controls the previously listed validations. If you want to remove these validations, then remove the validation steps from the workflow. For more information, see *TNT Apply Package Workflow*.

If any functions or nonfunction line items exist in the meeting package with a Posting Rhythm of Per Stay, then Min Duration must equal Max Duration.

Associating Functions and Function Line Items with a Meeting Package

You can create, edit, and delete functions and function line items. One or more functions can be associated with a meeting package. For each function, you can specify one or more function line items.

This task is a step in *Process of Setting Up Meeting Packages (Administrators)*.

To associate a function and function line items with a meeting package

1. Navigate to the Property Administration screen, Properties view, and find a property with an associated meeting package.
2. Click the link in the Property Name field.
3. Click the Meeting Packages view tab.
4. In the Meeting Packages list, select a meeting package with which you want to associate functions and function line items.

5. In the view link bar, click Function Line Items, and scroll to the end of the view.
6. In the Functions list, create a new function, and complete the fields as required.

   Some fields are described in the following table.

Field	Comments
Function Type	The type of function that is planned. The options include the Function Type LOV values defined for the current property.
Name	Name of the function.
Posting Rhythm	The selection options are: Per Day and Per Stay.
Applies To	The selection options are: DD, CMP, and DD/CMP. If the UoM of the function line item is Per Room, or if the Posting Rhythm of the function is Per Stay, then this field value must be CMP.
FS Rental/Person	The rental allocation for each person for a function space.
Function Space	The default space that is assigned to the function at booking time. The options include the function spaces available for the current property. If the FS Rental/Person field is populated, then this field cannot be null. When a meeting package is applied to a quote, Siebel Hospitality automatically populates the function space for the function with the value set in the meeting package administration record. This default function space can be updated on the quote. **Note:** It is recommended that you designate a default function space for all functions in meeting package administration records. If a function space is not displayed by default, and Best Fit does not find a suitable function space, then any function space that is added after a meeting package is applied to a quote is identified by Siebel Hospitality as a noncore line item. If a noncore line item is added to the meeting package at the time the quote is created, then that line item will have a zero price, so as not to affect the package price for each day.
Total Function Allocation	Read only. Calculated field that equals the sum of all line item allocations plus the rental allocation of the function. The rental allocation is considered to be the per person allocation for a function space. This field displays a value only if all the associated line item Adjustment Type values are Price Override or Per Person Allocation. If not, then this field is blank.

7. With the function record selected, create one or more line items for the function in the Line Items list and complete the required fields.

   Some fields are described in the following table.

Field	Comments
Item	Select a product to associate with the function. This field is constrained to products that are available for the current property and products that are not associated with a specific property.
Display Name	Read only. Name to be displayed for this line item in the Siebel Hospitality user interface. This field value is copied from the associated product record.
Qty	The quantity of this item that is included in the function. The default value is 1.
List Price	Seasonal price for this line item.
Adjustment Type	The type of price adjustment applied to the item. For information about the selection options for this field, see the About Adjustment Type Field Values section of this topic. If UoM is not equal to Per Person or Per Room, then the value in this field must be Per Person Allocation.
Value	The value of the adjustment. How this value is used depends on the selection in the Adjustment Type field. For more information, see the About Adjustment Type Field Values section of this topic.
Unit of Measure	Displays the UoM value of the associated product by default: o If the value of this field is not Per Person or Per Room, then the Adjustment Type value must be Per Person Allocation. o If the Applies To field in the associated function is set to DD or DD/CMP, then this field cannot be Per Room.
Revenue Sub Category	The revenue subcategory associated with this line item. It displays the Revenue Sub Category of the selected product by default.

8. Repeat Step 6 through Step 7 for each additional function and associated line items.

About Adjustment Type Field Values

Price adjustments are used to define a meeting package allocation for a meeting package item. The Adjustment Type field allows you to specify the type of adjustment to apply to meeting package function line item discounts. The entry in

the Value field specifies the adjustment amount or percentage, depending on the selection in the Adjustment Type field. The selection options are as follows:

- **Discount %.** The adjustment value is a percentage that is subtracted from the product list price. For example, 10 percent is deducted from the 200.00 list price for an allocation of 180.00.
- **Discount Amount.** The adjustment value is subtracted from the product list price. For example, 5.00 is deducted from the 50.00 list price for an allocation of 45.00.
- **Markup %.** The adjustment value is the percentage that is added to the product list price. For example, 20 percent is added to the 100.00 list price for an allocation of 120.00.
- **Markup Amount.** The adjustment value is added to the product list price. For example, 10.00 is added to the 30.00 list price for an allocation of 40.00.
- **Per Person Allocation.** At quote booking time, the adjustment value is multiplied by the number of expected attendees for the associated function. Use this adjustment type for items that do not have a Per Person or Per Room unit of measure but toward which each attendee must contribute revenue.

  For example, a function includes one projector. The line item record for the projector has a Unit of Measure field value of Each. In other words, each attendee is required to contribute revenue for the projector. The Per Person Allocation value is 10.00, and at quote time there are 50 expected attendees for the function. The projector will therefore contribute a total of 10.00 multiplied by 50, or 500.00 of revenue for the function.

  > **Note:** Per Person Allocation is not a selection option in the Adjustment Type field of the Sleeping Rooms view, Sleeping Room Prices list. This adjustment type is not applicable to sleeping rooms.

- **Price Override.** The adjustment value is the product allocation, overriding the original product list price. For example, a 15.00 allocation price overrides a 20.00 list price.

  > **CAUTION:** For sleeping rooms, if the Adjustment Type is not equal to Price Override and the meeting package allocation is based on the benchmark rate for that day as specified on the quote at run-time, then the package price is not calculated in the meeting package administration record.

Because the product for this line item might appear on more than one price list, Siebel Hospitality cannot assign a price list until the quote is created. Consequently, if you select an Adjustment Type other than Price Override or Per Person Allocation, then the Total Function Allocation field of the function record is blank.

Associating Nonfunction Line Items with a Meeting Package

Nonfunction line items are items that are not used in or part of any specific function. Typically, nonfunction line items are perks given to a customer as part of the meeting package. Examples are free Wi-Fi, gift certificates, golf credits, and spa credits. You can associate one or more nonfunction line items with a meeting package.

To create nonfunction line items for a meeting package, follow this procedure.

This task is a step in *Process of Setting Up Meeting Packages (Administrators)*.

To associate a nonfunction line item with a meeting package

1. Navigate to the Property Administration screen, Properties view, and find a property with an associated meeting package.
2. Click the link in the Property Name field.

3. Click the Meeting Packages view tab.
4. In the Meeting Packages list, select a meeting package with which you want to associate nonfunction line items.
5. In the view link bar, click Non Function Line Items, and scroll down to the list at the end of the view.
6. Create a new nonfunction line item in the list, and complete the fields as required.

   Some fields are described in the Function Line Items field table in *Associating Functions and Function Line Items with a Meeting Package*.
7. Complete the additional fields as required.

   Some fields are described in the following table.

Field	Comments
Posting Rhythm	The selection options are: Per Day and Per Stay. If the Min Duration and Max Duration values of the current meeting package are equal, then this value must be Per Stay.
Applies To	The selection options are: DD, CMP, and DD/CMP. If UoM is Per Room or if Posting Rhythm is Per Stay, then this field value must be CMP.

Associating Sleeping Room Types and Pricing Intervals with a Meeting Package

You can associate one or more sleeping room types with a meeting package. For each sleeping room type, you can specify one or more pricing intervals.

> **CAUTION:** When creating a meeting package with either CMP or DD/CMP components, you *must* add sleeping rooms to the meeting package. Otherwise, when the meeting package is added to a quote, users will be unable to enter the number of CMP attendees.

This task is a step in *Process of Setting Up Meeting Packages (Administrators)*.

To associate sleeping room types and pricing intervals with a meeting package

1. Navigate to the Property Administration screen, Properties view, and find a property with an associated meeting package.
2. Click the link in the Property Name field.
3. Click the Meeting Packages view tab.
4. In the Meeting Packages list, select a meeting package with which you want to associate sleeping rooms and pricing intervals.
5. In the view link bar, click Sleeping Rooms, and scroll down to the end of the view.
6. In the Sleeping Rooms list, create a new sleeping room, and complete the SR Type field.

   The selection options for this field are constrained to the sleeping rooms that are available for the current property and that have Type values other than ROH Sleeping Room. The other fields are populated from the selected SR Type record.

7. With the sleeping room type record selected, create one or more pricing intervals for the sleeping room in the Sleeping Room Prices list, and complete the required fields.

   Some fields are described in the following table.

Field	Comments
Start Date	Must be earlier than the End Date. The Start Date and End Date range of a pricing interval cannot overlap that of other pricing intervals associated with the same sleeping room type.
End Date	Must be later than the Start Date. The Start Date and End Date range of a pricing interval cannot overlap that of other pricing intervals associated with the same sleeping room type.
Adjustment Type	The type of price adjustment applied to the item. For information about the selection options for this field, see *About Adjustment Type Field Values*.
Value	The value of the adjustment. How this value is used depends on the selection in the Adjustment Type field. For more information, see *About Adjustment Type Field Values*.

Starting Meeting Package Price Per Day Calculations

After you enter sleeping room types and pricing intervals, Siebel Hospitality can perform meeting package price calculations. Your Siebel application displays the calculated results by attendee type and sleeping room type, and it shows a total meeting package price per day per attendee type. The calculation is for single occupancy for each pricing interval of each sleeping room type. Additionally, a meeting package price per day, minus sleeping rooms, is calculated for day delegates. For more information about price calculations, see *About Meeting Package Price Per Day Calculations*.

The price adjustment is calculated from the Benchmark Price at the time of the quote booking. The Benchmark Price is the price from the Property Pricing Admin screen, Sleeping Room view, Sleeping Room Pricing Controls list. For more information about benchmark prices, see *Setting Up Rates for Sleeping Rooms*.

This task is a step in *Process of Setting Up Meeting Packages (Administrators)*.

To start meeting package price per day calculations

1. Navigate to the Property Administration screen, Properties view, and find a property with an associated meeting package.
2. Click the link in the Property Name field.
3. Click the Meeting Packages view tab.
4. In the Meeting Packages list, select a meeting package for which you want to calculate pricing.
5. In the view link bar, click Sleeping Rooms.

   The Sleeping Rooms subview displays fields with information relevant to pricing calculations. The fields under the Occupancy Offsets heading display values as described in the following table.

Field	Comments
Single Price Offset	The price offset that can be applied to single rooms.
Double Price Offset	The price offset that can be applied to double rooms.
Triple Price Offset	The price offset that can be applied to triple rooms.
Quad Price Offset	The price offset that can be applied to quadruple rooms.

6. In the Sleeping Rooms subview, in the meeting package form after the view link bar, click Price Package.

   Siebel Hospitality calculates the pricing of the meeting package and displays the results in fields in the Sleeping Rooms subview. A field in the Sleeping Room Prices list in the lower part of the view displays a value for each sleeping room pricing interval, as described in the following table.

Field	Comments
Pkg Price (Per Day/Single Occ)	Read only. Price per day for each complete meeting package for a single occupancy sleeping room.

> **Note:** You can also click Price Package in the Function Line Items subview and the Non Function Line Items subview.

About Meeting Package Price Per Day Calculations

This topic describes how Siebel Hospitality calculates the meeting package price per day:

- **Sleeping Rooms.** For sleeping room records (in other words, CMP price per day for an SR Type), the formula is as follows:

  Meeting Package Price Per Day, Single Occupancy = (Sleeping room allocation for the SR Type) + (Sum of Per Day meeting package line item allocations for a CMP) + ((Sum of Per Stay meeting package line item allocations for a CMP) / (meeting package duration))

  This price does not include occupancy pricing offsets.
- **Day Delegates.** For Day Delegate records, the formula is as follows:

  Meeting Package Price Per Day = Sum of meeting package line item allocations for a DD

  The line item allocations and SR allocation are calculated from the price adjustments input.

Note: If the Adjustment Type is not Per Person Allocation or Price Override, the Package Price Per Day cannot be calculated because the item allocation is based on the list price, which in turn is derived from a price list. The administration record for that item might be associated with multiple price lists. The actual price list used is not known until a user adds the item to a quote.

Example of Meeting Package Price Per Day Calculations

This example shows price per day calculations for a meeting package with a two-day duration. Multiple functions, function line items, and sleeping rooms are associated with the meeting package. In the tables in this topic, *NA* stands for *Not applicable*.

The items and values for the Breakfast Meeting function are shown in the following table.

Parent Function — Child Item	Posting Rhythm	UoM	Applies To	List Price	Adjust-ment Type	Value	Quan-tity	Function Space Rental
Breakfast Meeting	Per Day	NA	DD/CMP	Not applicable	NA	NA	NA	50.00
— Breakfast Menu	NA	Per Person	NA	15.00	Price Override	10.00	1	NA
— Projector	NA	Each	NA	500.00	Per Person Allocation	10.00	1	NA

The items and values for the Happy Hour function are shown in the following table.

Parent Function — Child Item	Posting Rhythm	UoM	Applies To	List Price	Adjust-ment Type	Value	Quan-tity	Function Space Rental
Happy Hour	Per Stay	NA	CMP	NA	NA	NA	NA	50.00
— Appetizers	NA	Per Person	NA	10.00	Price Override	5.00	1	NA

The items and values for the Meet and Greet function are shown in the following table.

Parent Function — Child Item	Posting Rhythm	UoM	Applies To	List Price	Adjust-ment Type	Value	Quan-tity	Function Space Rental
Meet and Greet	Per Day	NA	DD	NA	NA	NA	NA	50.00
— Appetizers	NA	Per Person	NA	10.00	Price Override	9.50	1	NA

Parent Function — Child Item	Posting Rhythm	UoM	Applies To	List Price	Adjust-ment Type	Value	Quan-tity	Function Space Rental
— Projector	NA	Each	NA	500.00	Per Person Allocation	10.00	1	NA

The nonfunction items and their values are shown in the following table.

Item	Posting Rhythm	UoM	Applies To	List Price	Adjust-ment Type	Value	Quan-tity
Tour Book	Per Stay	Per Room	CMP	100.00	Price Override	75.00	1
Wi-Fi	Per Day	Per Person	DD/CMP	25.00	Price Override	10.00	1
Valet Parking	Per Day	Per Person	DD	35.00	Price Override	30.00	1

The sleeping room types and their values are shown in the following table.

Item	List Price	Adjustment Type	Value
Standard King	Can vary by day.	Price Override	200.00
Deluxe King	Can vary by day.	% Discount	10.00

For this example, the Package Price (Per Day) for each Sleeping Room Type is calculated as shown in the following table.

Note: If the sleeping room allocation is not based on a price override but is calculated from the benchmark rate for that day specified on the quote at run-time, then the package price cannot be calculated in the meeting package administration record.

Item	Standard King	Deluxe King
SR Allocation	200.00	Cannot be calculated because this value depends on the benchmark rate for the day on the quote.
Function 1 - BF menu	10.00	10.00
Function 1 - Projector	10.00	10.00
Function 1 - Fxn Space Rental	50.00	50.00

Item	Standard King	Deluxe King
Function 2 - Appetizers	2.50	2.50
Function 2 - Fxn Space Rental	25.00	25.00
Tour Book	37.50	37.50
Wi-Fi	10.00	10.00
Package Price (Per Day)	345.00	Cannot be calculated because the SR allocation is variable.

For this example, the Package Price (Per Day) for DD is calculated as shown in the following table.

Item	DD
F1 - BF menu	10.00
F1 - Projector	10.00
F1 - Fxn Space Rental	50.00
F3 - Appetizers	9.50
F3 - Projector	10.00
F3 - Fxn Space Rental	50.00
Wi-Fi	10.00
Valet	30.00
Package Price (Per Day)	179.50

13 Defining Event Templates

Defining Event Templates

This chapter describes how to create and manage event templates that are used in the opportunity and quote phase in Siebel Hospitality. It includes the following topics:

- *About Event Templates*
- *Process of Creating Event Templates*

About Event Templates

In the hospitality industry, there is a considerable repetition of events with similar function agendas and room blocks. For example, an existing customers might contact a sales representative and request an event similar to one that was held previously, such as an annual conference.

For such occasions, you can create predefined event templates that can be applied to opportunities or quotes. These templates automate a significant part of the work involved in defining opportunities and quotes, while allowing you to change details that make an opportunity or quote specific to a particular customer and event.

You can create two types of event templates for opportunities and quotes, as follows:

- **Generic Event Templates.** A generic event template is a template that can be applied to an event opportunity before a property is identified. A generic template includes generic products, generic setup styles, generic function types, and generic room block types associated with it, which allows many properties to qualify for an opportunity. Generic templates can also include associated historical opportunities and properties.
- **Property-Specific Event Templates.** A property-specific event template can be applied to an event quote when a property has been identified. A property-specific template identifies specific products available at the particular property, specific setup styles, specific function types, and specific room block types associated with the property.

Process of Creating Event Templates

This topic lists the tasks typically performed by a property manager when creating event templates. Your company might follow a different process according to its business requirements.

To set up event templates, perform the following tasks:

1. *Creating a Generic Event Template*
2. *Creating a Property-Specific Event Template*
3. *Adding an Agenda and Line Items to an Event Template*
4. *Adding nonfunction Line Items to an Event Template*
5. *Adding Room Block Information to an Event Template*
6. *Adding Room Blocks and Line Items to an Event Template*
7. *Adding Historical Opportunities to an Event Template*

8. *Adding Properties to an Event Template*

Creating a Generic Event Template

There are two ways in which a generic event template can be created:

- Conversion of an opportunity to a generic event template. This process is described in the Opportunities chapter. For more information, see *Applying an Event Template to an Opportunity*.
- Creation of a new template.

The following procedure details how to create the generic template record and details the overview information required for each generic template.

This task is a step in *Process of Creating Event Templates*.

To create a generic event template

1. Navigate to the Event Templates screen, then the Generic Template view.
2. In the Generic Template list, create a new record, click the Show More button, complete the required fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the template.
Event Template #	This number is automatically generated.
Peak # Attendees	The peak number of attendees who can attend the event.
Peak # Sleeping Rooms	The peak number of sleeping rooms for the event.
Peak # Function Spaces	The peak number of function spaces for the generic event.
Total # Nights	The total number of nights for which the rooms are blocked.
Business Type	Choose the business type in this field, that is, either Group or Local.
# of Days	The duration of the event.
Accounts	Complete this field to make the template specific to an account or number of accounts.
Contacts	Complete this field to make the template specific to a contact or number of contacts.

Field	Comments
Opportunity Market	Specifies whether or not the sales representative is selling within his or her assigned territory (In Market) or outside of it (Out of Market).
Opportunity Type	Means of classifying the opportunity, for example, Board Meeting, Job Fair, or Bar/Bat Mitzvah.
Opportunity Segment	The default is the market segment value, but the value can be changed to reflect a different user segment. For example, a corporate account typically would be associated with a corporate segment. However, if the corporation holds a social function, the segmentation attributes might be different (social segment rather than corporate).
Group Type	An additional classification means for the opportunity group.
Payment Method	Select a method of payment for the event.
Discount %	The percentage discount for the event.
Created Date	The date on which the template was created.
Created By	The User Id of the user who created the template.

Creating a Property-Specific Event Template

There are two ways in which a property-specific event template can be created, as follows:

- Conversion of a quote to a property-specific event template. This process is dealt with in the Quotes chapter. For more information, see *Applying a Property-Specific Event Template to a Quote*.
- Creation of a new template.

The following procedure describes how to create the property-specific template record and details the overview information required for each property-specific template.

This task is a step in *Process of Creating Event Templates*.

To create a property-specific event template

1. Navigate to the Event Templates screen, then the Property Specific Templates view.
2. In the Property Specific Templates list, create a new record, click the Show More button, complete the required fields, and then save the record.

   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the template.
Event Template #	This number is automatically generated.
Property	Choose a property with which this template is to be associated.
Peak # Attendees	The peak number of attendees who can attend the event.
Peak # Sleeping Rooms	The peak number of sleeping rooms for the event.
Total # Nights	The total number of nights for which the rooms will be blocked.
# of Days	The duration of the event.
Accounts	Complete this field to make the template specific to an account or number of accounts.
Contacts	Complete this field to make the template specific to a contact or number of contacts.
Post as Name	The post as name supplied here is applied to the quote.
Payment Method	Select a method of payment for the event.
Discount %	The percentage discount for the event.
Created Date	The date on which the template was created.
Created By	The User Id of the user who created the template.

Adding an Agenda and Line Items to an Event Template

The following procedure describes how to add function agendas and line items to both generic event templates and property-specific event templates. For more information about function agendas, see *Adding a Function Agenda and Line Items to an Event Opportunity*.

This task is a step in *Process of Creating Event Templates*.

To add an agenda and line items to an event template

1. Navigate to the Event Templates screen and do one of the following:
   - To add a function agenda and line items to a generic template, click the Generic Templates link.
   - To add a function agenda and line items to a property-specific template, click the Property Specific Templates link.
2. In the list, query for and select the required template.
3. Click the link in the Name field, and then click the Functions view tab.
4. In the Functions list, create a new record and complete the fields.

   Make sure that you add a Function Space and Post As Name for property-specific templates. For more information on the remaining fields, see *Adding a Function Agenda and Line Items to an Event Opportunity*.

   Scroll down to Line Items, create a new record, complete the fields, and save the record.

   The following table describes the fields that relate to property-specific templates only.

Field	Comments
Part #	The part number associated with the specific product.
Revenue Sub Category	Pick a revenue category with which this product is to be associated.
Revenue Category	This field is automatically populated when the Revenue Sub Category field is completed.
Parent Revenue Category	This field is automatically populated when the Revenue Sub Category field is completed.
Resource Type	This field is automatically populated when the Item field is completed.
Sequence #	This field is automatically populated when the Item field is completed.

   For more information on the remainder of these fields, see *Adding a Function Agenda and Line Items to an Event Opportunity*.

Adding nonfunction Line Items to an Event Template

A *nonfunction line item* is an item that is not used in or part of any specific function. Typically, nonfunction line items are perks given to a customer. Examples are wi-fi access, gift certificates, golf credits, and spa credits.

A property-specific event template can include nonfunction line items that are associated with an originating quote. You can also add nonfunction line items to a property-specific event template manually. Nonfunction line items can

be included only in property-specific event templates. Nonfunction line items cannot be included in generic event templates. To add a nonfunction line item to an event template, follow this procedure.

This task is a step in *Process of Creating Event Templates*.

To add a nonfunction line item to an event template

1. Navigate to the Event Templates screen and click the Property Specific Templates link.
2. In the list, query for and select the required template.
3. Click the link in the Name field, and then click the Non-Function Line Items view tab.
4. In the Non-Function Line Items List, create a new record and complete the fields as required.

   Some fields are described in the following table.

Field	Comments
Day #	Day number on which to apply the item.
Item	Product from which to generate the item.
Product Type	Type of product. Populated from the product administration record for the product selected in the Item field.
Qty	Number of items.
Extended Qty	Read only. Default is the value in the Qty field.
UoM	The unit of measure for the item.
Comments	If comments for line item were entered in the originating quote, then those comments are displayed in this field.
Revenue Sub Category	Read only. Populated from the product administration record for the product selected in the Item field.
Revenue Category	Automatically populated when a value is selected in the Revenue Sub Category field.
Revenue Parent Category	Automatically populated when a value is selected in the Revenue Sub Category field.
Resource Type	Read only. Displays the value that was set in the product administration record for the product selected in the Item field.

Adding Room Block Information to an Event Template

The following procedure details how to add room block information to both generic event templates and property-specific event templates. For more information about room block information, see *Adding Room Block Information to an Event Opportunity*.

This task is a step in *Process of Creating Event Templates*.

To add room block information to an event template

1. Navigate to the Event Templates screen, and click the appropriate link:
    - To add room block information to a generic template, click the Generic Templates link.
    - To add room block information to a property-specific template, click the Property Specific Templates link.
2. In the list, query for and select the required template.
3. Click the link in the Name field, and then click the Room Block Info view tab.
4. In the Room Block Info form, complete the fields and save the records. For more information about these fields, see *Adding Room Block Information to an Opportunity*.

Adding Room Blocks and Line Items to an Event Template

The following procedure details how to add room blocks and room block line items to a generic template. For more information about room blocks and line items, see *Adding Room Block Information to an Event Opportunity*.

This task is a step in *Process of Creating Event Templates*.

To add a room block and line items to an event template

1. Navigate to the Event Templates screen and do one of the following:
    - To add room blocks and line items to a generic template, click the Generic Templates link.
    - To add room blocks and line items to a property-specific template, click the Property Specific Templates link.
2. In the list, query for and select the required template.
3. Click the link in the Name field, and then click the Room Blocks view tab.
4. In the Room Blocks list, create new records, complete the fields, and save the records.

    The following table describes the fields that relate to property-specific templates only.

Field	Comments
Contact	(Optional) Associate a contact with the room block for the generic template.
Email	This field is automatically populated when the Contact field is completed.

Field	Comments
Fax #	This field is automatically populated when the Contact field is completed.
Phone #	This field is automatically populated when the Contact field is completed.
Address	This field is automatically populated when the Contact field is completed.

For more information about these fields, see *Adding Room Blocks to an Opportunity*.

5. Scroll down to the Room Block Line Items view, create new records, complete the fields, and save the records.

   For more information on these fields, see *Adding Room Blocks to an Opportunity*.

Adding Historical Opportunities to an Event Template

The following procedure details how to add historical opportunities to an event template. Historical opportunities associated with an event template will be associated with any opportunities to which the template is applied. For more information about adding historical opportunities, see *Entering Historical Data in the Histories Screen (User)*.

Note: Historical opportunities can only be added to generic event templates.

This task is a step in *Process of Creating Event Templates*.

To add a historical opportunity to an event template

1. Navigate to the Event Templates screen and click the Generic link.
2. In the Generic Template list, query for and select the required template.
3. Click the link in the Name field, and then click the Histories view tab.
4. In the Histories list, click New.

   A new historical opportunity record appears in the list.
5. In the Opportunity field of the historical opportunity, click the multiple select button.

   The Add Historical Opportunities dialog box appears with a row of query fields.
6. Enter query criteria for the historical opportunities to associate with the event template, and click Go.

   The Add Historical Opportunities dialog box displays those historical opportunities that are visible on the Histories screen, and that meet the query criteria you entered.
7. Do one of the following:

   - Select an existing historical opportunity to associate with the event template and click OK.
   - Create a new historical opportunity by clicking New, completing the fields in the Add Historical Opportunities dialog box, and clicking Save.

   The opportunity you selected or created appears in the Historical Opportunities list.

8. To view details of a historical opportunity such as associated quotes, functions, and room blocks, drill down on the Opportunity field.

   Siebel Hospitality displays details of the opportunity in the Histories view.

Adding Properties to an Event Template

The following procedure details how to add properties to an event template. Properties associated with an event template will be associated with any opportunities to which the template is applied. For more information about adding properties, see *Adding Property Records*.

Note: Properties can only be added to generic event templates.

This task is a step in *Process of Creating Event Templates*.

To add a property to an event template

1. Navigate to the Event Templates screen and click the Generic link.
2. In the Generic Template list, query for and select the required template.
3. Click the link in the Name field, and then click the Properties view tab.
4. In the Property list, click New.

   A new property record appears in the list.
5. In the Property field of the new record, click the single select button.

   The Pick Property dialog box appears.
6. Click Query and enter query criteria for the properties to associate with the event template, and click Go.

   The Pick Property dialog box displays a list of properties that meet the query criteria you entered.
7. Select a property to associate with the event template and click OK.

   The property you selected appears in the Property list.

14 Managing Hospitality Accounts and Contacts

Managing Hospitality Accounts and Contacts

This chapter describes the procedures that sales managers, event managers, and sales representatives perform to create and manage event Hospitality Accounts and Contacts. It includes the following topics:

- *About Hospitality Accounts and Contacts*
- *Process of Managing Hospitality Accounts*
- *Managing the Account Travel Profile*
- *Creating Account Event Templates*
- *Viewing Account Transactions*
- *Viewing Opportunities for Intermediary Accounts*
- *Creating an Account Business Plan*
- *Process of Managing Hospitality Contacts*
- *Managing a Travel Profile for a Contact*
- *Creating Event Templates for a Contact*

About Hospitality Accounts and Contacts

Siebel Hospitality allows sales representatives to enter details about prospective or existing customers, intermediary accounts, competitors, and partners by using Accounts and Contacts screens and views. An account is an individual, group of people (for example, a golf club), or company with which your company has a business relationship. A contact is a person who is a member of an account with which your organization has a business relationship. An account can have many contacts, and a contact can be a member of one or more accounts.

Before you can create event opportunities, quotes, and orders, you must profile your business accounts and contacts.

This chapter provides hospitality-specific account and contact profiling. For more information about account and contact profiling, see *Siebel Applications Administration Guide* .

Overview of Managing Hospitality Accounts and Contacts

When a customer contacts a sales representative, the sales representative researches and profiles the customer account to determine if the account and the contact are already in the database, and the status of the account.

You can use a variety of methods to verify that an account or contact exists in Siebel Hospitality, and add the records if necessary:

- **Accounts screen.** Navigate to the Accounts screen and query for the account. If you cannot find the account, create an account record. For more information about creating and managing accounts, see *Siebel Applications Administration Guide* .
- **Contacts screen.** Navigate to the Contacts screen and query for the contact. If the contact is not found, create a contact record. For more information about creating and managing contacts, see *Siebel Applications Administration Guide* .

After accounts or contacts have been created and profiled, you can create opportunities, quotes, orders, and event checks for the accounts and contacts. You can add further details (such as travel preferences) about the accounts and contacts at a later stage, as the details about the accounts and contacts become available.

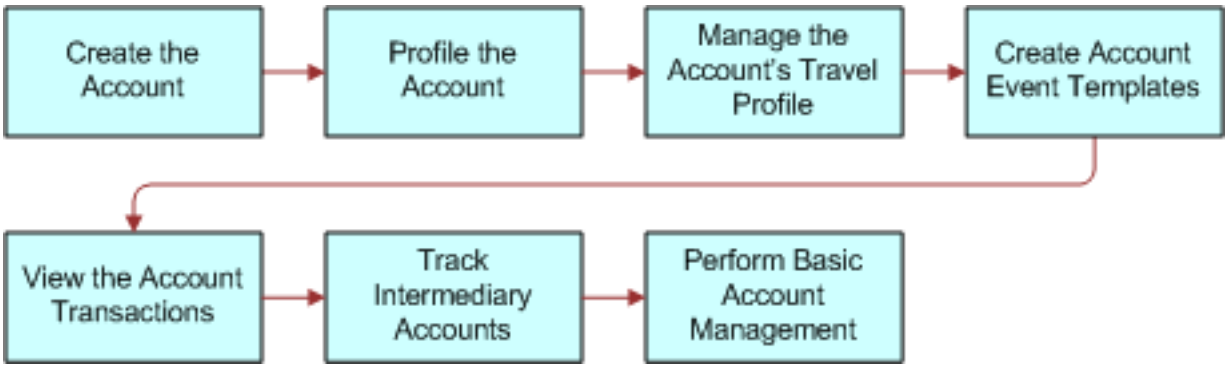
After you have created an account, you can manage the travel profile of the account, create event templates for the account, view the transactions of the account, track intermediary accounts, and create business plans for the account. You can also perform basic account management tasks, such as creating notes, attachments, and activities.

After you have created a contact, you can manage the travel profile of the contact, create event templates for the contact, and build contact loyalty. You can also perform basic contact management tasks, such as creating notes, attachments, and activities.

Process of Managing Hospitality Accounts

This topic outlines the tasks typically performed by hospitality sales representatives to manage accounts when creating an opportunity for an event. Your company might follow a different process according to its business requirements.

The following image illustrates the tasks for managing hospitality accounts.



To manage hospitality accounts, sales representatives typically perform the following tasks:

1. Create the Account - see *Siebel Applications Administration Guide* .
2. Profile the Account - see *Siebel Applications Administration Guide* .
3. *Managing the Account Travel Profile*
4. *Creating Account Event Templates*
5. *Viewing Account Transactions*
6. *Viewing Opportunities for Intermediary Accounts*
7. *Creating an Account Business Plan*
8. Performing Basic Account Management.

This includes managing notes, attachments and activities associated with the account. For more information, see *Siebel Applications Administration Guide* .

Managing the Account Travel Profile

The travel profile in Siebel Hospitality captures information such as the total revenue for the account, the amount the account spent on entertainment, the discounts available to the account, competitors, credit card spending, and intermediary accounts. This information can be useful to a sales representative when making decisions about opportunities and determining potential revenue from a customer.

You can add a new travel profile each year to keep track of changes in the profile from year to year. For example, you could track whether the total revenue or entertainment spending for a customer changes from year to year.

This topic contains the following tasks, and is a step in *Process of Managing Hospitality Accounts*.

- *Creating an Account Travel Profile*
- *Adding Brands to the Travel Profile*
- *Adding Intermediary Accounts to the Travel Profile*
- *Adding Competitors to the Travel Profile*
- *Adding Credit Card Spending Details to the Travel Profile*
- *Adding Travel Control Assessments to an Account*

Creating an Account Travel Profile

Use the following procedure to create a travel profile.

This task is a step in *Managing the Account Travel Profile*.

To create an account travel profile

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, query for and select the account.
3. Click the link in the Name field, and then click the Travel Profile view tab.
4. In the Profiles list, create a new record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Year	The relevant year for the travel profile.
Requires LRA	Last Room Availability. If this check box is selected, the account must receive its usual rate until the last room at the property has been sold, regardless of hotel occupancy.
Total Potential Room Nights	The total number of room nights within one year that the company expects the account to book at your hotels.

Field	Comments
Rooms Change Percentage	The projected percentage change in room nights booked between the current year and the previous year.
Total Potential Revenue	The total potential revenue from this account for one year. This value is calculated by multiplying the rate charged to the customer by the total potential room nights.
Total Sales	The total sales revenue that the account expects to reach during this year.
Net Income	The net income that the account expects to make this year.
Travel & Entertainment Spend	The total amount that the account is expected to spend on travel and entertainment this year.
Rates Listed	This check box indicates whether or not there are special rates available to this account.
Rates Listed in Directory	This check box indicates whether or not special rates for a number of properties are available to the account. These rates are listed using a directory format.
Extended Stay in Directory	This field indicates whether or not extended stay rates for a number of properties are defined for the account. These rates are listed using a directory format.
Account Discount	This text field indicates the discount available to this account.
Max # of Blackout Dates	Indicates the maximum number of times that the special rates can be restricted within one year.
Requirements and Requests	Records any special requirements or requests for the account.
Compelling Events and Important Issues	This field indicates key events for this account that could generate specific business opportunities.
Comments	Enter any comments about the travel profile.
Activity in Market	This text field indicates any activity in the market relevant to the company.
BT Buying Decisions	Indicates any policies that the account uses to make business transient (BT) buying decisions. For example, transient reservations might be made through a travel planner.

Field	Comments
Reservation Method	This field indicates the reservation method for transient reservations.
Max Rate Increase/Market	The maximum rate or increase that the account will accept according to the market and year by year.
Compliance Percentage	This field indicates the percentage of compliance for each quarter for those accounts that are contracted to use a predetermined number of rooms per year.

Adding Brands to the Travel Profile

Adding brands to the travel profile allows you to indicate the property brand and travel segment preference for the account during a particular year.

To add brands to the travel profile

1. In the Profiles list, select the required travel profile.
2. Scroll down to the Brand list, create a new record, complete the fields, and save the record.
   The following table describes some of the fields.

Field	Comments
Brand	Select the hotel brand preferred by the account.
Segment	Select the travel segment that is relevant to this account.
Comments	Add comments about the brand preference.

Adding Intermediary Accounts to the Travel Profile

Intermediary accounts are accounts that create opportunities for your company for certain other accounts. You can add an intermediary account to the travel profile to indicate the companies that refer account business to your company during a particular year.

To add intermediary accounts to the travel profile

1. In the Profiles list, select the travel profile.

2. Scroll down to the Intermediary list, and create a new record.
3. Complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Account Name	Select an intermediary account from the picklist.
Street Address	This field is automatically populated when the Account Name field is completed.
City	This field is automatically populated when the Account Name field is completed.
Comments	Add any relevant comments for the intermediary account.

Adding Competitors to the Travel Profile

You can add competitors to the travel profile to list other companies that are competing for the business of the account.

To add competitors to the travel profile

1. In the Profiles list, select the required travel profile.
2. Scroll down to the Competitors list, and create a new record.
3. Complete the fields, and save the record.

   The following table describes the fields.

Field	Comments
Competitor Name	Select the name of the competitor.
Preferred Program	Indicates whether or not the competitor is part of the Competitor Preferred Program.
Rate	The rate this competitor offered to the account.
Comments	Add any relevant comments about the competitor.

Adding Credit Card Spending Details to the Travel Profile

Detailing credit card spending allows you to analyze the properties where the account spends the most using the account credit card.

To add credit card spending details to the travel profile

1. In the Profiles list, select the required travel profile.
2. Scroll down to the Credit Card Spending list, and create a new record.
3. Complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Hotel	Select a property from the drop-down list.
Hotel Spending	Enter the amount of money spent at the property by the account.
Competitive Set Spending	Enter the amount of money spent at the competitive set of the property. The competitive set refers to all other properties that are in competition with your property for the business of the account.
Share Percentage	The percentage spent at this property as compared to all other properties that the account uses.

Adding Travel Control Assessments to an Account

Some accounts have one or more tools that a travel manager for that account uses to better control expenses related to travel, and to streamline the whole travel process. Travel control assessments can be used to assess these tools. This assessment can include review of communication from the account, frequency of use of company credit cards, deals with other travel vendors, and so on. For example, Online Booking Products might be important to a particular account. For each account, you can record the travel control assessments that are important to that account.

This task is a step in *Managing the Account Travel Profile*.

To add a travel control assessment to an account

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, query for and select the required account.
3. Click the link in the Name field, and then click the Travel Control Assessment view tab.
4. Create a control assessment record, select a control name value, and then click Assessment.

5. In the Control Assessments list, click Assessment, and then click Confirm to populate the entire list of control assessments.

   CAUTION: When you generate control assessment records, existing records are deleted.

6. Add a rating for each control assessment.

Creating Account Event Templates

You can create event templates that are specific to an account and then create an opportunity directly from the event template. This capability is useful in creating an opportunity for an account that involves an event that is similar to an event previously held.

For more information about event templates, see *About Event Templates*.

This task is a step in *Managing the Account Travel Profile*.

To create an account event template

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, query for and select the account.
3. Click the link in the Name field, and then click the Event Templates view tab.
4. Choose the appropriate option:
   - To create a generic event template for the account, click the Generic link.
   - To create a property-specific event template for the account, click the Property Specific link.
5. In the Event Templates list, create a new Event Template record, complete the fields, and save the record.
6. Click the link in the Name field to enter more specific details about the event template, including relevant information for room blocks and functions.

   For more detailed information about creating event templates, see *Process of Creating Event Templates*.

To create an opportunity from an account event template

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, query for and select the account.
3. Click the link in the Name field, and then click the Event Template view tab.
4. Click the Generic link.
5. In the Event Templates list, select the event template, and click Create.
6. In the Pick Event Template/Opportunity dialog box, complete the fields, and click OK.

   For more information about these fields, see *Applying an Event Template to an Opportunity* and *Applying a Property-Specific Event Template to a Quote*.

Viewing Account Transactions

Using the Accounts screen, you can view all opportunities, quotes, and orders for a particular account. The information included on these screens gives a sales representative or sales manager an indication of the volume of business and amount of revenue brought in by the account.

This task is a step in *Managing the Account Travel Profile*.

To view account transactions

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, query for and select the account.
3. Click the appropriate view tab:
   - To view account opportunities, click the Opportunities view tab.
   - To view account quote, click the Quotes view tab.
   - To view account orders, click the Orders view tab.

Viewing Opportunities for Intermediary Accounts

An *intermediary account* is a company that refers account business to your company that eventually becomes a revenue-generating opportunity. For example, an intermediary account might be a travel agency. An account might approach a travel agency for assistance with booking a number of rooms in a particular region. The travel agency might then refer the account to your company, at which point you can create opportunity for the accounts.

You can review all opportunities referred to you by intermediary accounts to determine the value an intermediary account brings to your company.

This task is a step in *Managing the Account Travel Profile*.

To view opportunities for intermediary accounts

1. Navigate to the Accounts screen, then the Intermediary Account view.
2. In the Intermediary Account form, query for the required account.
3. Scroll down to the Opportunities list.

   All opportunities associated with the intermediary account are displayed in the Opportunities list.

Creating an Account Business Plan

For each account, you can create a business plan to help generate revenue from future opportunities. This plan can be useful when targeting accounts for special offers and deals. Siebel Hospitality allows you to enter business plans for accounts over specified time periods. You can create as many business plans for the account as you require.

This task is a step in *Managing the Account Travel Profile*.

To create an account business plan

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, query for and select the required account.
3. Click the link in the Account Name field, and then click the Business Plans view tab.
4. In the Business Plans list, create a new record, complete the fields, and save the record.

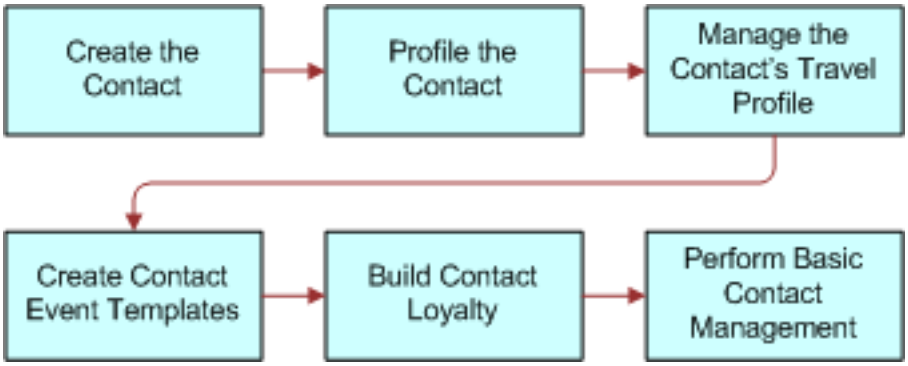
   The following table describes some of the fields.

Field	Comments
Name	Enter a name for the business plan.
Account	The account name, which is automatically selected.
Period	A time period to which this business plan applies.
Start Date	This field is automatically populated when the Period field is completed.
End Date	This field is automatically populated when the Period field is completed.
Type	Select the type of business plan. Options are Local, Regional, or National.
Created By	The User Id of the user who created this plan.
Team	The name of the team associated with the plan creator.
Description	Enter the details of the plan in this field.

Process of Managing Hospitality Contacts

This topic outlines the tasks typically performed by hospitality sales representatives to manage contacts when creating an opportunity for an event. Your company might follow a different process according to its business requirements.

The following image illustrates the tasks for managing hospitality contacts.



To manage hospitality accounts, sales representatives typically perform the following tasks:

1. Create the Contact - see *Siebel Applications Administration Guide* .
2. Profile the Contact - see *Siebel Applications Administration Guide* .
3. *Managing a Travel Profile for a Contact*
4. *Creating Event Templates for a Contact*
5. Build Contact Loyalty - see *Siebel Loyalty Administration Guide* .
6. Performing Basic Contact Management.
   Basic Contact Management includes managing notes, attachments, and activities associated with the contact. For more information, see *Siebel Applications Administration Guide* .

Managing a Travel Profile for a Contact

You can use the travel profile to store details about the travel preferences of a contact, such as hotel preference, travel preference, and some personal preferences. This information can be valuable to a sales representative when creating an opportunity for a contact and can help to progress the opportunity.

This task is a step in *Managing the Account Travel Profile*.

To create a travel profile for a contact

1. Navigate to the Contacts screen, then the Contacts List view.
2. In the Contacts list, query for and select the contact.
3. Click the link in the Last Name field, and then click the Travel Profile view tab.
4. In the Travel Profile form, complete the fields.
   The following table describes some of the fields.

Field	Comments
Preferred Hotel Chain	Select the hotel chain preferred by the contact.
Preferred Brand	Select the brand of hotel preferred by the contact.
Preferred Hotels	Select the properties preferred by the contact.

Field	Comments
Preferred Bed Type	Select the type of bed preferred by the contact; for example, double, king size, and so on.
Smoking Preference	Select whether the contact prefers a smoking or nonsmoking room.
Preferred Paper	Select the newspaper preferred by the contact.
Preferred Airline Name	Select the airline preferred by the contact.
Preferred Rental Car	Select the rental company from which the contact prefers to rent a car.
Preferred Cruise Lines	Select the cruise lines preferred by the contact.
Comment	Enter any relevant comments about the travel preferences of the contact.

Creating Event Templates for a Contact

You can create event templates that are specific to a contact, and then create an opportunity directly from the event template. This information can be useful in creating an opportunity for a contact that was similar to an event that the contact previously booked.

For more information about event templates, see *About Event Templates*.

This task is a step in *Managing the Account Travel Profile*.

To create an event template for a contact

1. Navigate to the Contacts screen, then the Contacts List view.
2. In the Contacts list, query for and select the contact.
3. Click the link in the Last Name field, and then click the Event Templates view tab.
4. Click the Generic link.
5. In the Event Templates list, create a new Event Template record, complete the fields, and save the record.
6. Click the link in the Name field to enter more specific details about the event template.
7. Enter relevant information for room blocks and functions.

   For more detailed information about creating event templates, see *Process of Creating Event Templates*.

To create an opportunity from a contact event template

1. Navigate to the Contacts screen, then the Contacts List view.

2. In the Contacts list, query for and select the required contact.
3. Click the link in the Last Name field, and then click the Event Templates view tab.
4. Click the appropriate link:
    - To create an opportunity from a generic event template for the contact, click the Generic link.
    - To create an opportunity from a property-specific event template for the contact, click the Property Specific link.
5. In the Event Templates list, select the required event template, and click Create.
6. In the Pick Event Template/Opportunity dialog box, complete the fields, and click OK.

   For more information about these fields, see *Applying an Event Template to an Opportunity* and *Applying a Property-Specific Event Template to a Quote*.

15 Capturing Hospitality Opportunities

Capturing Hospitality Opportunities

This chapter describes the procedures that sales managers and event managers perform to create and add details to an event opportunity, using Siebel Hospitality software. It includes the following topics:

- *Scenario for Capturing Hospitality Opportunities*
- *Process of Capturing Hospitality Opportunities*
- *Creating Event Opportunities*
- *Adding a Function Agenda and Line Items to an Event Opportunity*
- *Adding Room Block Information to an Event Opportunity*
- *Selecting Properties for an Event Opportunity*
- *Applying an Event Template to an Opportunity*
- *Creating an Event Template from an Opportunity*
- *Adding Details to an Event Opportunity*
- *Adding Billing Information to an Event Opportunity*
- *Adding Macro Estimates to an Event Opportunity*
- *Adding an Assessment to an Event Opportunity*
- *Capturing Event Opportunity Information*
- *Assigning Host and Affiliate Relationships to Opportunities*
- *Viewing Opportunity Details with the Opportunity Explorer*
- *Analyzing Opportunities with Charts*

Scenario for Capturing Hospitality Opportunities

This scenario provides an example of a process performed by an events sales representative to create and add details to opportunities. Your company might follow a different process according to its business requirements.

A customer contacts an event sales representative at the National Sales Organization Center to discuss holding an event at a hotel property. The event customer provides some generic information about the type of functions that are contemplated and the room blocks that are required to support the functions of the event. The customer specifies some property preferences and details the payment method. In addition, the event customer wants the property to provide free transportation for event attendees from the airport to the property.

The sales representative captures this information as an opportunity and then performs an assessment of the opportunity so that each participating property can determine the value of the opportunity.

Process of Capturing Hospitality Opportunities

This topic lists the tasks typically performed by hospitality sales representatives when creating an opportunity for an event. Your company might follow a different process according to its business requirements.

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

1. *Creating Event Opportunities*
2. *Adding a Function Agenda and Line Items to an Event Opportunity*
3. *Adding Room Block Information to an Event Opportunity*
4. *Selecting Properties for an Event Opportunity*
5. *Applying an Event Template to an Opportunity*
6. *Adding Details to an Event Opportunity*
7. *Adding Billing Information to an Event Opportunity*
8. *Adding Macro Estimates to an Event Opportunity*
9. *Adding an Assessment to an Event Opportunity*
10. *Capturing Event Opportunity Information*
11. *Assigning Host and Affiliate Relationships to Opportunities*
12. *Viewing Opportunity Details with the Opportunity Explorer*
13. *Analyzing Opportunities with Charts*

Creating Event Opportunities

An opportunity can be created from a number of screens. For example, in addition to using the Opportunity screens and views, you can create opportunities from the Accounts and Contacts screens by clicking the Opportunities view tab associated with those screens.

> **CAUTION:** When modifying an opportunity, make sure that you are on the sales team that is associated with the opportunity. In other words, make sure your name is on the list in the Sales Team field of the opportunity record. Not doing so can lead to unpredictable and undesired results.

For example, suppose you select an opportunity with an associated sales team that does not include you. The selected opportunity has an associated room block, which in turn has room block line items. If you change the Arrival Date of the opportunity, you cannot access the functionality for selecting Update Dates or Update Day Numbers to specify how to apply the change to associated records. Consequently, the change to the Arrival Date is not propagated to the Date fields on the room block line items.

This task is a step in *Process of Capturing Hospitality Opportunities*.

To create an event opportunity

1. Navigate to the Opportunities screen.
2. From the Opportunities Home view, complete the fields in the Add form, and then click Add & Go.
3. Click the More Info view tab and perform the following actions.
    a. Complete the fields in the Key Information section.

Some fields are described in the following table.

Field	Comments
Name	The opportunity name.
Projected Property	The property that is most likely to win the bid in the case of more than one property bid. If the property is flagged, the property is associated with the estimated revenue for the opportunity when the quote is generated. You can choose a nonparticipating property for the opportunity if necessary.
Revenue	Read only. The total rolled up amount from the projected property revenue.
Currency	The currency used for the opportunity transaction.
Business Type	Indicates whether the opportunity is group or local. A local opportunity typically does not require sleeping rooms.
Sales Status	Read only. When the opportunity record is created, the status is automatically set to Prospect.
Peak # Function Spaces	The number of function spaces required for this opportunity.
Peak # Rooms	The number of rooms required for this opportunity.

b. Complete the fields in the Arrival Information section.

Some fields are described in the following table.

Field	Comments
Arrival Date	The date and time the event begins on the property.
# of Nights	A value can be entered, or the value can be calculated from the arrival and departure dates.
Departure Date	You can enter the date of departure, or it can be calculated from entries in the Arrival date and # of Days fields.

Field	Comments
Decision Date	The date when the customer must make a decision about the terms of the event. Managers can reference this date when developing revenue forecasts or releasing inventory.

c. Complete the fields in the Account and Contact Information section.

Some fields are described in the following table.

Field	Comments
Account	The account associated with the opportunity function. A new account can be added, but existing account information cannot be edited from this view.
Intermediary Account	The intermediary account that brought the business to the property.
First Name, Last Name	Name of the account contact. Select the Primary check box if the individual is the primary contact for the event. Click the Contract check box to include the contact as the primary contact in the event contract record.

d. Complete the fields in the General Information section.

Some fields are described in the following table.

Field	Comments
Description	A text description of the opportunity.
Post as Name	The name that appears on the customer documents and announcement boards.
Parking Code	The contractual terms for guest parking, which might include a parking fee or valet services.
Sales Team	Members of the sales organization involved in the event sale. The default is the user ID of the opportunity creator.
Opportunity #	A unique identifier for the opportunity.

e. Complete the fields in the Dates section.

Some fields are described in the following table.

Field	Comments
Alternate Dates	Alternate dates for the event opportunity in case the desired dates cannot be booked.
Preferred Dates	The preferred dates for the event. These dates are entered for informational purposes, until dates can be set at the function and function agenda levels.

f. Complete the fields in the Tracking Information section.

Some fields are described in the following table.

Field	Comments
Sales Status Date	Date of the last status change.
Reason Won/Lost	The reason the opportunity was lost. Examples are Price, Relationship, Terms, Property Physical Attributes, Lost to Competition, and so on. **Note:** Values are only available for selection if the Sales Status is set to Lost/Turndown.
Originating Property	The property originally requested by the customer. This field is used when the original customer request cannot be fulfilled and another property is selected.

g. Complete the fields in the Capacity Requirements section.

Some fields are described in the following table.

Field	Comments
Total # Nights	Read only. The total number of nights allocated to the opportunity.
Peak # Attendees	The maximum number of attendees expected for the event.

h. Complete the fields in the Classification Information section.

Some fields are described in the following table.

Field	Comments
Opportunity Type	Means of classifying the opportunity, for example, Board Meeting, Job Fair, Bar/Bat Mitzvah, and so on.
Group Type	An additional classification means for the opportunity group.
Opportunity Market	Specifies whether or not the sales representative is selling within his or her assigned territory (In Market) or outside of it (Out of Market).
Opportunity Segment	Default value is the market segment value, but the value can be changed to reflect a different user segment. For example, a corporate account is typically associated with a corporate segment. However, if the corporation holds a social function, the segmentation attributes might be different (social segment rather than corporate segment).

i. Complete the fields in the Influence Mechanism section.

Some fields are described in the following table.

Field	Comments
External Event	Another external event that is a compelling factor for the new opportunity. An example would be a scheduled sports event in the area.
Lead Source	The source of the opportunity. Options include Convention & Visitors Bureau, Direct Response, EBC, Field Sales, Inquiry, and so on.

j. Complete the fields in the Qualification Information section.

Some fields are described in the following table.

Field	Comments
Opportunity Overview	An overview of the opportunity provided by the sales representative.
Customer Needs/Objectives	Key factors that the client must consider when selecting the property. For example, a new product release function might have special requirements.

Field	Comments
Concession	Any concessions that the property must make. For example, if the customer requires free transportation to and from an airport, record that fact here.
Competitor	The name of any other company that is also competing for the opportunity.
Budget Considerations	Details the amount that the client generally spends on an event and the amount spent on the last event.
History	Comments on the previous history of this customer.

k. Complete the fields in the Manager Information section.

Some fields are described in the following table.

Field	Comments
Sales Manager	The name of the sales manager for the opportunity. The person who creates the opportunity is the sales manager for this opportunity by default, but this value can be changed if necessary. When a quote is generated, the name of the Sales Manager is transferred to the quote. Similarly, when the quote becomes an order, the name of the Sales Manager is transferred to the order.
Event Manager	The name of the event manager for this opportunity. When a quote is generated, the name of the Event Manager is transferred to the quote. Similarly, when the quote becomes an order, the name of the Event Manager is transferred to the order.

l. Complete the fields in the Relationship Information section.

Some fields are described in the following table.

Field	Comments
Relationship Type	The type of relationship between the opportunity and other opportunities.
Affiliate Accounts	The affiliate account for this opportunity. For more information about affiliate relationships, see *Assigning Host and Affiliate Relationships to Opportunities*.

Field	Comments
Parent Opportunity	The parent opportunity.

Specifying Sleeping Room Rates for an Opportunity

When you create an opportunity, one of the fields that you must complete is the Opportunity Segment field. This field is important for determining the sleeping room costs to be applied to the opportunity. In this field, you can specify that the opportunity is part of the government segment. If you do this, government rates are applied to the sleeping room. If you do not specify a government rate, then ordinary sleeping room rates are applied to the sleeping rooms for the opportunity.

Note: By default, the government rate cannot be offered to a group unless the government rate is open for every day that the group is resident at the property. That is, if the government rate is not available for a single day of the room block, then the whole room block cannot be offered at the government rate regardless of the segment with which the opportunity is associated. Your company might follow a different process according to its business requirements.

To specify the sleeping room rates for an opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity.
3. Click the Show More button on the opportunity form.
4. Scroll down to the Classification Information section of the form, and in the Opportunity Segment Field, do one of the following:
    - To apply government sleeping room rates to the sleeping rooms for the opportunity, select Federal Government, Government Contractor, International Government, Local Government, or State Government.
    - To apply regular sleeping room rates to the sleeping rooms for the opportunity, select any option other than Federal Government, Government Contractor, International Government, Local Government, or State Government.

    The appropriate government rate is applied to the sleeping rooms associated with the opportunity.

Adding a Function Agenda and Line Items to an Event Opportunity

After an opportunity is created, the event sales representative can enter the proposed agenda and line item information for the opportunity using the Opportunity screen, Function Agenda view, and Agenda Line Items subview.

Because this activity occurs at the beginning of a sales stage, event sales associates typically have not yet identified the specific function space or catering items that must be quoted. However, they can enter sample agenda items and subfunctions, the estimated capacity (how many individuals are planning to attend the event), and general catering requirements for each of the functions planned for the event.

This topic includes the following topics and is a step in *Process of Capturing Hospitality Opportunities*.

- *Adding a Function Agenda to an Event Opportunity*
- *Adding Line Items to a Function Agenda*
- *Organizing Functions with the Function Agenda Buttons*

Adding a Function Agenda to an Event Opportunity

The Functions Agenda view includes special functionality buttons that you can use to build function hierarchies and to flag functions that are to be bypassed during the availability check. For more information, see *Organizing Functions with the Function Agenda Buttons*.

This task is a step in *Adding a Function Agenda and Line Items to an Event Opportunity*.

To add a function agenda to an event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. In the Function Agenda list, create a new record, and complete the fields.

> **Note:** Enter values in the Room Area, or Setup Style and Expected Attendees fields (or enter information in all three fields). If you specify a setup style and do not provide a value for Expected Attendees, an error occurs during the quote generation process.

The following table describes some of the fields.

Field	Comments
Day #	The day number of the function.
Date	The date of the function.
Day	Automatically calculated from the date.
Function Type	The type of function that is planned. Options include Keynote Address, Lecture, Panel Discussion, Roundtable, Seminar, Workshop, Breakfast, Lunch, Dinner, Breakout, Entertainment, Exhibition, Offsite, and 24 Hour Hold.
Function Name	The name of the function. The default is the function type, but the name can be changed.
Start Time	The start time of the function.
Duration (mins)	The duration of the function.

Field	Comments
End Time	The end time of the function. The user can specify a start time and an end time and the duration is automatically calculated.
Meal Period	If there is to be a meal provided with the function, select the appropriate meal period, for example, dinner, lunch, and so on.
Setup Style	The setup style for the function. Setup styles that have been defined as universally available appear in the list. For more information about setup styles, see *Setting Up Function Spaces, Sleeping Rooms, and Suites* and *Defining Day Parts, Status Indicators, and Setup Style Translations*.
Expected Attendees	The expected number of attendees for the function, from the estimates provided by the customer.
Projected	The number of attendees the sales representative actually expects to attend the function. This value is used when projecting revenue.
Room Area	Function space size. The room area that the customer wants for the function space, stated in square feet. The user can change any default value that appears in this field. If the value is entered in square meters, the value is automatically converted.
Spacious Set	When this flag is selected, the expected number of attendees is multiplied by 1.5, and the result number is used in the best fit and next fit calculation. As a default, the check box is not selected. The multiplier can be changed during configuration using Siebel Tools.
Flow	This flag is used to indicate to the property operations staff if the customers are arriving all at once (check box not selected) or in a flow (check box selected).
Noise	This flag is used to indicate that the function is expected to generate noise that might inconvenience other guests at the property.
Bypass	If the check box is selected, the best-fit process with availability check is bypassed.
Best Fit Suite Only	If this flag is selected, then the best-fit algorithm is only applied to function space of type suite.

Field	Comments
Room Area (Sq. m)	The room area specified by the customer for the function in square meters. The user can specify a value either in square feet or square meters, and the other value is calculated.
Feature	Choose a Product Feature if applicable. For more information about Product Features, see *Siebel Product Administration Guide* .
Detail	Select this check box to indicate that this function contains smaller subfunctions, and if the subfunctions will possibly contain smaller breakout functions (breakout functions are children of subfunctions and grandchildren of functions). Sometimes, when the function is booked by a customer, details of subfunctions and breakout functions might not be known at the time that the function is booked. If you select this check box: o You can create subfunctions for the function, and further break out functions for the subfunction. o The Day #, Date, Start Time, Duration, and End Time fields become read only. o For subfunctions and breakout functions, the Date is the same as for the parent function, and the Start and End times occur within the Start and End times for the parent function.

Adding Line Items to a Function Agenda

The Function Agenda line Items list provides the details such as service and products required for each function on the agenda.

This task is a step in *Adding a Function Agenda and Line Items to an Event Opportunity*.

To add line items to a function agenda

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, select the opportunity, and click the link in the Opportunity Name field.
3. In the Function Agenda list, select the function agenda record.
4. Scroll down to the Agenda Line Items list, and add a record.
5. Complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Item	Select the agenda line item product name, such as coffee, soft drinks, and a table.

Field	Comments
Product Type	This field is automatically populated with a value of Generic when the Item field is completed. This is because at the opportunity stage, only generic products can be selected. The generic products are mapped to specific products when a quote is generated.
UoM	Unit of measure for the product, for example, one gallon of coffee.
Service Start	Service start time of catered products. The default is the function start time, but the user can change this value.
Quantity	Quantity of items calculated from the unit of measure (UoM).
Description	A description of the function agenda line item.

Organizing Functions with the Function Agenda Buttons

Using function agenda buttons, you can copy existing functions for an event opportunity and edit the details, as well as create a hierarchy of nested functions within functions. The Bypass button allows you to skip automatic availability checks for the selected function.

This task is a step in *Adding a Function Agenda and Line Items to an Event Opportunity*.

Creating a Hierarchy of Opportunity Functions

You can build a three-level hierarchy of parent functions, subfunctions, and child subfunctions. To build a hierarchy of opportunity functions, follow this procedure.

To create a hierarchy of opportunity functions

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. In the Opportunities list, query for an opportunity.
3. In the Opportunities record, click the link in the Opportunity Name field.
4. In the Function Agenda list, add a function record, and complete the fields.

   Some fields are described in the following table.

Field	Comments
Function Type	Select 24 Hour Hold to make the record a space hold function.
Function Space	Select a function space to associate with the function. Available function spaces for subfunctions are constrained to subdivisions of the parent function space.

Field	Comments
Detail	Select to indicate the detailed parent function. **Note:** For functions for which the Detail check box is not selected, you can define only one hierarchical level, for example, function, then subfunction.

5. Build a hierarchy of function, subfunction, and child subfunction records using the following methods:
    - Click the Move up and Move down buttons to position a function under the detailed function record. Click the Demote one level button once to indent the function under the primary function and make it a subfunction. Click the Demote one level button twice to indent the function under a subfunction and make it a child subfunction.
    - Select the primary function and click the Sub Function button to build a hierarchy of subfunctions under the detailed function in the Create Agenda Sub Function dialog box. Select a subfunction and click the Sub Function button to add a child subfunction under the current subfunction in the Create Agenda Sub Function dialog box.

For more information about building a hierarchy of subfunctions and child subfunctions under a detailed function, see *Detailing a Function*.

Copying to Create Multiple Related Functions

The Copy function speeds up the event agenda creation process by allowing the user to reuse the work completed for previous functions. If another function has many of the same characteristics as the new function, the user can duplicate a function and then edit it to reflect the new function's unique requirements. For example, you can keep some function line items, add new line items, and delete line items that do not apply.

The user can select multiple function records and create multiple copies of a selected function, and then associate subfunctions and line items across a selected date range.

To copy a single function

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for the opportunity record.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. In the Function Agenda list, select the required function, and click Copy.
5. In the Copy Function form, complete the fields, and then click Copy.

    In the Copy Function form, if you select the subfunction check box, then the subfunctions are automatically copied. If the subfunction check box is not selected, then only the function and the line items associated with the function are copied.

    If you then select the Line Item check box, the line items associated with the original function are copied to the new function. By default, the subfunction and line item flags are selected, and the function is associated with the original opportunity for the function. You can select another opportunity if necessary.

    You can also create multiple records by selecting a value greater than 1 in the #of Copies/Day field. You can also change the function timing by changing the values in the Start From (date), Duration, Start Time or # of Days fields.

If you change the start time of the function, then the start times of all line items that are copied are also changed.

To copy multiple functions at the same time

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity record.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. In the Function Agenda list, select the functions:
    - To choose contiguous functions, select the first function, press SHIFT, and then select the last function to be copied.
    - To choose nonadjacent functions, select the first function, press CTRL, and then select another function.
5. Click Copy, complete the fields in the Copy Function form, and then click Copy again.
6. Update the fields in the new record.

Skipping Availability Checks for Functions

In the Function Agenda view, you can use Bypass to skip the availability process at the individual function level. Bypassing a function causes the following:

- The function space room rental is not determined or reserved for the function.
- The required threshold is not calculated for the function.
- The required threshold for the quote is not calculated.

If generic products have been mapped to specific products, such as specific catering items, the correct product prices appear.

Adding Room Block Information to an Event Opportunity

Entering general room block information in the Opportunity screen, Room Block view associates the Room Block Line Items with the opportunity. Room Block information can also be entered and refined after a quote is created for the opportunity. For more information, see *Managing Event Room Block Information in Quotes*.

This topic includes the following topics and is a step in *Process of Capturing Hospitality Opportunities*:

- *Capturing Room Block Information with Rapid Room Block*
- *Adding Room Block Information to an Opportunity*
- *Adding Room Blocks to an Opportunity*
- *Adding Room Block Line Items to an Opportunity*
- *Copying Room Block Line Items*

Capturing Room Block Information with Rapid Room Block

When creating an opportunity with a customer, a sales representative might want to fill out room block information without keeping the customer supplying details on the phone for a long time. A sales representative can use Rapid Room Block for fast entry of room block information.

This task is a step in *Adding Room Block Information to an Event Opportunity*.

To capture room block information with Rapid Room Block

1. When you have created an opportunity, click the link in the # of Nights field. The Rapid Room Blocks view tab is displayed.
2. In the Rapid Room Blocks list, create a new room block.

   For more information on how to create a new room block, see *Adding Room Blocks to an Opportunity*.
3. In the Rapid Room Blocks list, click Create.

   The Rapid Room Blocks list is automatically populated with a record for each generic room type at the property. For each room type, there is a field for each day for which the rooms are blocked. In this field, you can specify the number of rooms of that type required for that day.

   > **Note:** You can only use the Create button once to create the initial record. After you have used the button to create the initial record, it becomes unavailable for use.
4. For each required room type, enter the amount of rooms to be reserved for each night of the room block, and save each record.
5. When you have entered the information for each room block using Rapid Room Block, click the Room Block view tab.

   The room block information entered using Rapid Room Block automatically appears in this view, where it can be further modified if necessary.

Adding Room Block Information to an Opportunity

Before creating room blocks, a sales representative can add general information that applies to all room blocks. This information gives details on the percentages of room types, their price offsets, and the commission amounts applied to the room blocks.

This task is a step in *Adding Room Block Information to an Event Opportunity*.

To add room block information to an opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity record.
3. In the Opportunity record, click the link in the Opportunity # field.
4. Click the Room Block Info view tab, and complete the fields in the form.

   The following table describes the fields.

Field	Comments
Single %	The percentage of single rooms in the total room blocks.
Double %	The percentage of double rooms in the total room blocks.
Triple %	The percentage of triple rooms in the total room blocks.
Quadruple %	The percentage of quadruple rooms in the total room blocks.
Single Price Offset	The price offset that can be applied to single rooms.
Double Price Offset	The price offset that can be applied to double rooms.
Triple Price Offset	The price offset that can be applied to triple rooms.
Quadruple Price Offset	The price offset that can be applied to quadruple rooms.
Commission Amount	The commission amount specified for the group room block.
Commission %	The commission percent applied to the group room block. You can specify either a Commission Amount or a Commission %, but not both.
Room Notes	Special requests such as room rates and other room block details.

Adding Room Blocks to an Opportunity

A room block is a collection of room block items, and corresponds primarily to one billing item. When making a group reservation, a customer might want to specify billing methods and rates for different parts of the group. To satisfy these requirements, you can create a number of different room blocks (with a number of room block line items attached) as part of the same opportunity.

This task is a step in *Adding Room Block Information to an Event Opportunity*.

To add a room block to an opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity record.
3. In the Opportunity record, click the link in the Opportunity # field.

4. Click the Room Blocks view tab.
5. In the Room Blocks list, create a new record, and complete the fields.

   The following table describes some of the fields.

Field	Comments
Name	The name for the room block.
Date Created	The date on which the room block was created.
Created By	The User Id of the user who created this room block.
Billing Method	Choose an appropriate method from the list.
Reservation Method	Choose the method by which the room block was reserved. The methods are as follows: o Rooming List. A list of rooms required is sent to the property by the event organizers. o Individual Reservations. Each individual attending the event is responsible for calling the hotel to make a room reservation. o Reservation Cards. A number of reservation cards for the property were completed and sent in to the property. o Housing Agency. An intermediate agency handles the booking of room blocks for the group.
Reservation Type	Choose one of the following reservation types for the room block: o **GTDC**. The reservation for an individual is guaranteed for arrival by the attendees' company. No-shows are charged for the reservation. o **GTDI.** The reservation is guaranteed by the individual attending the event (usually by a credit card). If the reservation is not cancelled within a predefined period of time, the individual is charged for the reservation. o **NGTD.** The reservation for an individual is not guaranteed and the reservation is released for sale by 6 P.M. on the specified date of arrival.
Cutoff Date	The deadline to reserve the rooms. If the customer has not reserved the rooms by this date, the revenue manager can release the space for use by other groups.
Housing Restriction	Select this check box if there is a housing restriction for this room block.
Housing Company Name	Select the housing company for this room block.
Sequence #	Defines where this room block appears in the list of room blocks in the quote.

Note: In the Room Block Line Items list, you might only have one record with the same Room Type and Day #.

Adding Room Block Line Items to an Opportunity

The following procedure details how to add room block line items to an opportunity.

This task is a step in *Adding Room Block Information to an Event Opportunity*.

To add room block line items to an opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity record.
3. In the Opportunity record, click the link in the Opportunity # field.
4. Click the Room Blocks view tab, and select the room block to which to add line items.
5. Scroll down to the Room Block Line Items list, create a record, and complete the fields.

Note: If a room block has not yet been created, you can click New in the Room Block Line Items view to create a default room block with which the new line item is associated. Clicking this button can help to speed up data entry.

The following table describes some of the fields.

Field	Comments
Date	Date of the room block.
Day #	Day number associated with the room block line item.
Day	Automatically calculated based upon the date. This field is read only.
Room Type	Room types for each room block line item.
Contracted	The number of rooms for a particular room type, according to the contract.
Projected	The number of rooms for a particular room type that the sales user thinks could actually be used.
Blocked	The number of rooms for a particular room type that the sales user would actually block to account for cancellations and so on.
Complimentary	The number of complimentary rooms for each room block line item.

Field	Comments

6. After the Room Block Line Items list, view the Totals row, which shows the total number of room blocks from all room block line items.

Copying Room Block Line Items

Sales representatives can copy room block line items when necessary.

This task is a step in *Adding Room Block Information to an Event Opportunity*.

To copy room block line items

1. Navigate to the Room Block Line Items view.
2. In the Room Block Line Items list, select the room block item.
3. Click Copy.
4. Modify the values in the Copy Room Block dialog box, and then click Copy again.

Selecting Properties for an Event Opportunity

After an opportunity is created for an event, the event sales representative selects one or more appropriate properties, and then generates a quote for each property.

The customer might be interested in reserving a specific property for the event, or the customer might have general requirements that must be met by the property. If only general attributes are specified by the customer, then the sales representative searches for a property that meets the requirements. The sales representative can use the Property Locator and the Property Screen to locate an appropriate property. If an appropriate property is identified, the sales representative can add the property to the Opportunity Properties list.

To select properties for an event, you can do the following:

- *Searching for Properties for an Opportunity*
- *Identifying a Property for an Opportunity*
- *Adding a Property to an Opportunity*

Note: If you already know the property that you want to select for the event opportunity (for example, the customer might specify a particular property), you do not have to use the Property Locator or Property screen.

This task is a step in *Process of Capturing Hospitality Opportunities*.

Searching for Properties for an Opportunity

The Property Locator can be used to find properties in a particular region or area. The Property Locator is available from the Property screen. When you search for a property in the Property Locator, you must enter address details in the search fields. You can also enter other details about the property, such as market segment, brand, or facilities

information. However, the Property Locator is primarily a tool for locating properties in a particular area or region. When you have used the Property Locator to find a list of possible properties, you can choose the appropriate property using the Properties list.

This task is a step in *Selecting Properties for an Event Opportunity*.

To search for properties for an opportunity

1. Navigate to the Property screen, then the Property Locator view.
2. Enter details in the search fields, making sure that you enter information in either the City and State fields, or in the Zip Code field, and click Search.

   The following table describes some of the fields.

Field	Comments
Name	The name of the property for which you are searching.
Property Type	Select the required properties type if it is known.
CRS Code	Select the Central Reservation System code of the property, if it is known.
Market Tier	Select the market segment in which the required properties are classified.
Brand	Select the brand of the required properties.
Service Level	The level of service offered by the properties.
Weekend-Weekday	Indicates whether or not weekend-weekday pricing is to be used at the required properties.
Pool	Indicates if there is a pool at the required properties.
Golf	Indicates if there are golfing facilities available at the required properties.
Beach Nearby	Indicates if there is a beach near the required properties.
City	Indicates the city in which the required properties are located.
State	Indicates the state in which the required properties are located.
Country	Indicates the country in which the required properties are located.

Field	Comments
Province	Indicates the province in which the required properties are located.
Zip Code	Indicates the zip code for the required properties.
Distance In	Indicates whether the search range is measured in miles or kilometers.
Search Range	Indicates the maximum distance from the ZIP code or city the required properties can be located.
Business Center	Indicates if there is a business center at the required properties.
Restaurant	Indicates if there is a restaurant at the required properties.
Nearest Airport	Indicates the airport nearest to the required properties.

If there are properties matching the criteria specified, these properties are displayed in the Properties list. If there are no properties matching the criteria specified, an error message is displayed informing you to refine your search.

Identifying a Property for an Opportunity

When you have narrowed the list of properties to properties in a specific area, you can use the Property screen to decide on the appropriate property or properties to use for the opportunity.

This task is a step in *Selecting Properties for an Event Opportunity*.

To identify a property for an opportunity

1. Do one of the following:
   - Use the Property Locator to find a list of properties in a specific area, as described in *Searching for Properties for an Opportunity*.
   - Navigate to the Properties screen, then the Properties view, and query for properties.
2. For each property potential in the list, click the link in the Property Name field.
3. Using the view tabs, determine whether or not the property is appropriate for the opportunity in terms of facilities, sleeping room availability, neighborhood, and so on.

   If you decide that the property is appropriate for the opportunity, you can add it to the opportunity.

Adding a Property to an Opportunity

The following predictor details how to add a property to an opportunity. When the sales representative navigates to the Opportunity screen, Properties view, there are a number of buttons that can be used when working with properties, as follows:

- **Query.** Use this button to perform an attribute search on property records already added to the Property list. Property attributes include CRS Code, Brand, City, State, # of Guest Rooms, and so on.
- **New.** Use this button to access the Property Search list, where you can perform an attribute search for a list of properties, and then add the properties to the list.
- **Create Quote.** Use this button to create a quote for each selected property. After a quote is created, the Opportunity Quotes view appears. For more information, see *Generating an Event Quote*.
- **Bypass.**Select Bypass for a property record to skip the availability check when the quote is created.

  Bypass is both a button and a check box field. You can manually select a Bypass check box, or select multiple property records and click the Bypass button to flag all selected records for bypass.

Note: The conversion from generic to property-specific room blocks takes place for bypassed property records, and pricing is also returned for these properties.

This task is a step in *Selecting Properties for an Event Opportunity*.

To add a property to an opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Properties view tab.
5. In the Properties list, create a new record, and from the Add Properties list, query for properties meeting the desired criteria.
6. In the Add Properties list, select all relevant properties, and then click OK.
7. In the Properties list, select the Primary check box to designate the primary property.

Applying an Event Template to an Opportunity

After an opportunity has been created, you can apply an event template or the format of an existing opportunity to the new opportunity to define standard information about that opportunity. For example, you can apply an event template for weddings, where there are a number of standard functions and room blocks that are used for the wedding. Using event templates can reduce the amount of time it takes to create the opportunity.

When you apply an event template to an opportunity, you overwrite the existing information in the opportunity with information contained in the template. For information about creating an event template, see *Defining Event Templates*.

Note: Event templates can be applied to opportunities for nonparticipating properties.

This topic is a step in *Process of Capturing Hospitality Opportunities*.

To apply an event template to an opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. Click the menu button, and select Apply Event Template.
4. In the Pick Event Template/Opportunity dialog box, complete the fields, and click OK.

   The following table describes some of the fields.

Field	Comments
Template/Opportunity	Provides a list of all generic event templates and existing opportunities that can be applied as a template to the new opportunity.
Arrival Date	Specify an arrival date for the event.
Header	Select to overwrite the information in the More Info form and the Room Block Info view with the information contained in the template.
Functions	Select to copy all functions in the template to the new opportunity.
Sub Functions	Select to copy all subfunctions in the template to the new opportunity.
Line Items	Select to copy all line items for functions and subfunctions in the template to the new opportunity.
Room Block Line Items	Select to copy all sleeping room blocks in the template to the new opportunity.
Histories	Select to copy all historical records associated with the event template from the template to the opportunity.
Properties	Select to copy all property information from the template to the opportunity.

Creating an Event Template from an Opportunity

If the information defined in an opportunity can be used as an event template, you can create a template from that opportunity.

To create an event template from an opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity.
3. Click the menu button, and select Create Generic Template.
   The template appears in the Generic list in the Event Templates screen.

Adding Details to an Event Opportunity

Although an event opportunity might not have many details specified (such as the actual dates for the event and the anticipated attendance), there are other details, such as event preparation activities, and preliminary documents and notes, that you can associate with the opportunity for assessment by the event planning team.

This topic includes the following topics and is a step in *Process of Capturing Hospitality Opportunities*.

- *Modifying the Opportunity Arrival Date*
- *Adding Activities to an Event Opportunity*
- *Adding Attachments to an Event Opportunity*
- *Adding Notes to an Event Opportunity*

Modifying the Opportunity Arrival Date

If necessary, you can change the arrival and departure date information for an event opportunity, or delete the arrival date. When you change the arrival date for an event opportunity, you can control how the dates of associated functions and room blocks change.

This task is a step in *Adding Details to an Event Opportunity*.

Changing the Opportunity Arrival Date

To change the arrival date for an event opportunity, follow this procedure.

To change the opportunity arrival date

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. In the Opportunities list, query for the opportunity whose arrival date you want to change.
3. Proceed to one of the steps described in the following table.

To...	Go To...
Automatically shift the dates of associated functions and room blocks by the same number of days as the opportunity arrival date	Step 4
Control how the dates of associated functions and room blocks	Step 5

To...	Go To...
are shifted when you shift the opportunity arrival date	

4. To shift function and room block dates the same as the opportunity, perform the following steps.
   a. In the Arrival Date field, select a new date.

      Siebel Hospitality shifts the dates for the associated functions and room blocks by the same number of days as the new arrival date you entered for the opportunity. The day estimates under the Macro Estimates view also change according to the change to the function dates.

      > **Note:** This default behavior can be changed through the business component user properties Shift Functions and Shift RoomBlocks.

   b. Go to Step 6.
5. To control the function and room block date shifts, perform the following steps.
   a. Do one of the following.

      - Click Modify Arrival Date.
      - Click Menu and choose Modify Arrival Date.

      The Enter/Change Arrival Date dialog box appears.
   b. In the Enter/Change Arrival Date dialog box, complete the fields.

      Some fields are described in the table that follows.

Option	Comments
Arrival Date	Enter a new arrival date for the opportunity.
Shift Functions	Indicates whether to shift function dates according to the change to the arrival date of the opportunity. - When selected (default), shifts the dates for the associated functions by the same number of days as the new arrival date you entered for the opportunity. The day estimates under the Macro Estimates view also change in this way. - When cleared, retains the original dates of associated functions. Changes the values in the Day Number fields of the functions to reflect the new relationship between the opportunity arrival date and the function dates. The Day Number field value is the day number in relation to the arrival date, where the arrival date is equal to a value of 1. For example, if you change the arrival date of an opportunity from June 4 to June 2, but retain June 4 as the date for associated functions and room blocks, the Day Number field values of the functions change from 1 to 3.
Shift Room Blocks	Indicates whether to shift room block dates according to the change to the arrival date of the opportunity.

Option	Comments
	- When selected (default), shifts the dates of associated room blocks to the same date as the new arrival date for the opportunity. - When cleared, retains the original dates of associated room blocks. Changes the values in the Day Number fields of the room blocks to reflect the new relationship between the opportunity arrival date and the room block dates. The Day Number field value is the day number in relation to the arrival date, where the arrival date is equal to a value of 1. For example, if you change the arrival date of an opportunity from June 4 to June 2, but retain June 4 as the date for associated functions and room blocks, the Day Number field values of the room blocks change from 1 to 3.

c. Click OK to confirm the date changes and close the dialog box.

6. To verify the changes to functions and room blocks, perform the following steps.
   a. Click the link in the Opportunity Name field of the current opportunity.
   b. Click the Function Agenda view tab.
   c. In the functions list, check the values in the Day # and Date fields.
   d. Click the Room Blocks view tab.
   e. In the Room Block Line Items list, check the values in the Day # and Date fields.

> **Note:** If subopportunities are associated with an opportunity whose arrival date is changed, the arrival dates of the subopportunities change by the same number of days. The dates of functions and sleeping rooms associated with the subopportunities also shift according to how you shift the dates of functions and sleeping rooms associated with the parent opportunity. However, this default behavior can be changed through the Shift SubOpportunities user property.

Deleting the Opportunity Arrival Date

To delete the arrival date for an opportunity, follow this procedure.

To delete the opportunity arrival date

1. In the Opportunities list, query for an opportunity whose arrival date you want to remove.
2. Delete the date in the Arrival Date field.

   The dates of the associated functions and room blocks are also deleted, but the relative day numbers stay the same. For example, the arrival date for an opportunity is 1/1/11 and an associated function day number is 3, which is 1/3/11. If you delete the arrival date from the opportunity record, the 1/3/11 date is deleted from the function record, but the function remains scheduled for day 3.

   The arrival dates of associated subopportunities, the dates of associated subopportunity functions, and the dates of associated subopportunity room blocks are not deleted.

Adding Activities to an Event Opportunity

You can associate activities with the opportunity record using the Activities view. For more information about activities, see *Siebel Applications Administration Guide* .

This task is a step in *Adding Details to an Event Opportunity*.

To add activities to an event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Activities view tab.
5. In the Activities list, add a record, and complete the fields.

   Repeat this step for each activity.

Adding Attachments to an Event Opportunity

As part of creating a history of event details, sales representatives and event managers can attach files such as contracts or maps of exhibition displays to the opportunity. The Attachments list for Siebel Hospitality uses standard Siebel fields and procedures for attachments. For more information about attachments, see *Siebel Fundamentals* .

This task is a step in *Adding Details to an Event Opportunity*.

To add an attachment to an event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Attachments view tab.
5. In the Attachments list, click either New File or New URL.
6. Associate the file with the opportunity record.

To view an attachment to an event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Attachments view tab.
5. In the Attachments list, select the attachment record, and click the link in the Name field.
6. From the File Download dialog box, choose one of the following alternatives:
   - Open this file from its current location.
   - Save this file to disk.
7. Click OK.

Adding Notes to an Event Opportunity

Sales team members can add text notes to the opportunity, using the Notes view. Notes can be designated as private (accessible only by the creator) or public (accessible by the entire events planning team).

This task is a step in *Adding Details to an Event Opportunity*.

To add notes to an event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Notes view tab, and then click the Public Notes or Private Notes link.
5. In the Notes list, add a record, and, in the Description field, add the note text.
6. Click Check Spelling to verify spelling in the field.

Adding Billing Information to an Event Opportunity

In the Opportunity Billing Information view, the sales representative can enter information about an account that is different from the primary account that is used for event billing purposes. This view is also used to enter related information such as the deposit fee for a particular property, cancellation fee, tax exemptions, and so on.

This task is a step in *Process of Capturing Hospitality Opportunities*.

To add billing information to an event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity record.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Billing Information view tab, and complete the fields in the form.

   The following table describes some of the fields.

Field	Comments
Account	The account associated with the billing. For more information, see *About Bill-to Information in Event Planning*.
Contact	The primary person associated with the account.
Cancel Fee Amount	The amount applied if there is a cancellation. Enter a value in this field or the Cancel Fee % field.
Cancel Fee %	The percentage amount that is applied if a cancellation occurs. Enter a value in this field or in the Cancel Fee Amount field.
Deposit Amount	Sum of money used to secure the event. Click the single select button to complete the Amount Received, Deposit Due, and Deposit Date.
Amount Received	The amount of the deposit received.

Field	Comments
Deposit Due	The date on which the deposit is due.
Deposit Date	The date on which the deposit is received. This value is automatically populated when the Deposit received flag is set.
Deposit Received	A check box flag that when selected indicates the deposit has been received.
Tax Exempt	If the check box is selected, it indicates tax exempt status for the account selected in the Account field.
Tax Exempt Approved	If selected, it indicates the tax exempt status is approved for the event.
County Tax Exempt #	County Tax Exempt number.
City Tax Exempt #	The City Tax Exempt number.
State Tax Exempt #	State Tax Exempt number.
County Applicable	The county for which taxes are exempt.
City Applicable	The applicable city for taxation.
State Applicable	Indicates the applicable state for taxation.

About Bill-to Information in Event Planning

The bill-to information is automatically transferred to the quote and can be used during other stages of the event planning. When an order is created for an event, the default value of the bill-to information of the order is the bill-to information of the event. The user can manually change the bill-to information if, for example, a function is billed to a different company, or the contact for a bill changes. Bill-to information is also referenced when generating an Event Check.

Recording Deposits for an Event

During the event sales process, the customer might be required to pay one or more deposits that are applied to the final cost of the event. For example, the deposit might include $750 due with the signed contract, the contracted deposit

might be payable at the time of a signed agreement, with 50 percent of the estimated balance due 30 days before the event, and the balance due 72 hours before the event.

In a typical scenario, the sales representative records the amount of the deposit, and when it is due. When the customer remits the first deposit payment, the sales representative records the amount received, the date it is received, and completes the turnover process to Event Management. As additional deposit funds are remitted by the customer, the Event Manager revisits the Billing Information view, records the latest deposit, and the date received. This process continues until all of the deposits are received. The last deposit recorded appears in the Billing Information form field.

This task is a step in *Process of Capturing Hospitality Opportunities*.

To record deposits for an event

1. Navigate to the Opportunities screen, then the List view.
2. From the Opportunities list, query for and select the opportunity record.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. From the Opportunity form, click the Billing Information view tab.
5. In the Deposit Information section, click the single select button in the Deposit Amount field.
6. From the Deposit dialog box, create a new record, complete the fields, and click Save.

   Repeat this procedure to record each deposit payment.

Adding Macro Estimates to an Event Opportunity

At an early stage in the process of making a sale, a sales representative typically tries to find out how much the customer is willing to spend for the full event and also how much the customer is willing to spend for each day during the event. The sales representative can either estimate the amount from previous experience or can talk to the customer to get approximate values. Estimates are based on the expected revenue and number of attendees for a particular revenue category.

The information entered at the opportunity stage is passed to the quote when it is generated. The Macro Estimates are relevant until more detail becomes available either from average values or actual line items. However, if these details do not become available, it is possible for the sales representative to use the macro estimates instead of revenue estimates for the quote.

Macro estimates can be added for both participating and nonparticipating properties.

This task is a step in *Process of Capturing Hospitality Opportunities*.

To add macro estimates to an event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Macro Estimates view tab.
5. Perform whichever of the following tasks is appropriate for your requirements:
   - To add all revenue categories to the Macro Estimates list, click Populate.
   - To add a specific category to the Macro Estimates list, create a new record, and select a revenue category in the Revenue Category field.

The Parent Revenue Categories for each Revenue Category is populated to the Parent Revenue Category field.

6. Enter a Total Revenue estimate for the opportunity, and an estimate for the Total Expected Employees.
   The Total Revenue - Per Person is automatically calculated when these two fields are completed.
7. When you are satisfied with the Total Revenue and Total Expected Employees values, click Allocate.
   The day estimates for the category are generated and displayed in the Day Estimates list. The number of days for each opportunity is equal to the number of nights plus one day, because, for example, an opportunity that is booked for four nights spans five days in total.
   The following two fields are automatically populated:
   - **Calculated Average Check.** The average cost to be spent on the selected category on each day of the opportunity. This field is calculated as follows:
     Calculated Average Check = Total Revenue/(# of Nights +1)

     Note: This figure is rounded to the nearest unit of currency.
   - **Calculated Total Revenue.** The sum of the average costs for each day of the opportunity. This field is calculated as follows:
     Calculated Total Revenue = Sum of all Day Estimates Revenue field
8. (Optional) Scroll down to the Day Estimates list to make any desired changes to the existing estimates.
   The values are rolled up to the macro estimate for the revenue category.

Adding an Assessment to an Event Opportunity

The sales associate can use the Assessment view to perform an assessment of the opportunity so that each participating property can view the value of the opportunity.

This task is a step in *Process of Capturing Hospitality Opportunities*.

To add an assessment to an event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Assessments view tab.
5. In the Assessments list, create a new record.
6. In the new record, select a predefined assessment template from the list in the Template Name field.
   For more information about creating assessment templates with predefined attributes, see *Siebel Applications Administration Guide* .
7. Scroll down to the Assessment Attributes list, and then rate each attribute by completing the Value field for each attribute in the list.
   The scores are automatically calculated and appear in the Assessment Score and Percentage fields in the Assessment record.

8. (Optional) In the Assessment record, change the Assessment Name.

Capturing Event Opportunity Information

Sales users can capture high-level information about an event opportunity using the Opportunity Capture view.

The Capture view helps the user specify the following opportunity information from one location:

- Property information
- Macro Revenue Estimates
- Function Agenda information
- Room Block information

This task is a step in *Process of Capturing Hospitality Opportunities*.

To capture event opportunity information

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Capture view tab.
5. In the Properties list, create a new record and complete the fields.
6. In the Dates list, create new records for one or more sets of arrival and departure dates for the selected property.

   You can create multiple arrival and departure date records for each of multiple properties in an opportunity.
7. In the RB list, click Create to create a new Room Block:

   a. In the Room Block dialog box, create a new record and complete the fields.
   b. For each required room type, enter the number of rooms required for each night.

   > **Note:** You can only create room blocks line items from this list if you have not already created room blocks. The Create button is unavailable if you have already created room blocks.

   You can click the link in the Rooms field to navigate to the Opportunity Room Blocks view.
8. In the Functions list, create a new agenda record, and complete the fields.
   - Click Copy to duplicate and modify existing agenda items.
   - Click the link in the Day # field to navigate to the Opportunity Function Agenda view.
   - For a parent function, click Sub Function to add subfunctions under the function.
9. In the Macro Est list, create a new record, select a category, and complete the fields.

Assigning Host and Affiliate Relationships to Opportunities

A *host-affiliate* relationship for opportunities is a relationship where one company (the host) handles an entire event and then other companies (the affiliates) do individual parts of the event. For example, a company might decide to host an event at a property, and might ask another company to take part in one of the events. In general, the host would perform the following duties:

- Determining the affiliates for the functions
- Booking function space and hotel rooms, and then allocating the space and rooms to the affiliates
- Booking all inventory, and later distributing this inventory to the affiliates
- Negotiating a deal with the hotel chain to get a special rate, which cannot be extended to the affiliates

Host opportunities are represented by one parent opportunity. Affiliate opportunities associated with this opportunity are created as subopportunities of the host opportunity. Host opportunities and affiliate opportunities can be associated with nonparticipating properties.

> **Note:** For host-affiliate opportunities, allocation of inventory must be done manually by the sales representative. This means that inventory is not automatically mapped to property-specific inventory during the quote generation process. For more information about adding inventory to opportunities at the quote stage, see *Managing Hospitality Inventory*.

This topic includes the following topics and is a step in *Process of Capturing Hospitality Opportunities*.

- *Creating a Host Opportunity*
- *Associating Affiliate Accounts with a Host Opportunity*
- *Creating an Affiliate Opportunity*

Creating a Host Opportunity

The host opportunity is created from the Opportunities list in the same manner as other opportunities.

This task is a step in *Assigning Host and Affiliate Relationships to Opportunities*.

To create a host opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, create a new record, and set the Relationship Type field of the record to Host.
3. Complete the remaining fields, and then save the record.

   For more information on these fields, see *Creating Event Opportunities*.

Associating Affiliate Accounts with a Host Opportunity

Affiliate accounts are added using the Affiliate Accounts view. From this view, you can specify the affiliate accounts, contacts, and other information associated with the opportunity.

This task is a step in *Assigning Host and Affiliate Relationships to Opportunities*.

To associate an affiliate account with a host opportunity

1. Create a host opportunity, as described in *Creating a Host Opportunity*.
2. Click the link in the Opportunity Name field, and then click the Affiliate Accounts view tab.
3. In the Affiliate Accounts list, create a new record, complete the fields, and then save the record.

   The following table describes some of the fields.

Field	Comments
Primary	Select this check box if the account is the primary affiliate account for the opportunity.
Account	Select an account to be affiliated with the opportunity from the drop-down list.
Last Name	Select a contact from the drop-down list.
First Name	This field is automatically populated when the Last Name field is completed.
Status	Select the status of the affiliate.
Role	Select the role of the affiliate account.
Code	Enter a code for the affiliate if necessary.
Peak # Attendees	The peak number of affiliate attendees.
Rate	Enter details of the rate at which sleeping rooms and functions spaces can be offered.
Function Space Requirement	Enter details about function space requirements for the affiliate.
Sleeping Room Requirement	Enter details about sleeping room requirements for the affiliate.
Work Phone #	This field is automatically populated when the Last Name field is completed.

Field	Comments

Creating an Affiliate Opportunity

When you have created the host opportunity, and added affiliate accounts, you can then create affiliate opportunities.

This task is a step in *Assigning Host and Affiliate Relationships to Opportunities*.

To create an affiliate opportunity

1. Create an opportunity as described in *Creating a Host Opportunity*.
2. Click the link in the Name field, and then click the Affiliate Opportunities view tab.
3. In the Affiliate Opportunities list, create a new record, complete the fields, and save the record.

   For more information about these fields, see *Creating Event Opportunities*.
4. Scroll down to the Room Block Items list, and create new records as necessary.

   For more information about Room Blocks, see *Adding Room Block Information to an Event Opportunity*.
5. In the Agenda Functions list, create new records as necessary.

   For more information about Function Agendas, see *Adding a Function Agenda and Line Items to an Event Opportunity*.

Note: You cannot add a property to affiliate opportunities. The property can only be added at the host level. For more information, see *Creating a Host Opportunity*.

Viewing Opportunity Details with the Opportunity Explorer

The Opportunity Explorer can be used to view details about all opportunities in Siebel Hospitality. However, it can be especially useful when dealing with recurring events and host-affiliate opportunities. The Opportunity Explorer allows you to view details about an opportunity by selecting the opportunity in an explorer window and then using the folders in the explorer window to view the details.

This task is a step in *Process of Capturing Hospitality Opportunities*.

To view opportunity details with the Opportunity Explorer

1. Navigate to the Opportunities screen, then the Opportunity Explorer view.
2. In the Opportunities list, query for and select the opportunity record in the Explorer pane on the side of the screen.
3. Use the opportunity subfolders to review the opportunity details.

Analyzing Opportunities with Charts

You can analyze opportunities using a variety of different chart formats including pie charts and bar charts. Opportunities at all stages can be viewed as charts. This includes definite, lost/turndown, canceled, T1/T2, prospect, actualized, recurring and host/affiliate opportunities.

This task is a step in *Process of Capturing Hospitality Opportunities*.

To analyze opportunities with charts

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for the opportunities to analyze in a chart.
3. Click the Opportunity Charts link.
4. In the Select Chart drop-down list, select the chart type to view.
5. In the Chart Format drop-down list, select the format in which to view the analysis.

   The chart appears in the format that you selected.

16 Associating Historical and Future Data with Hospitality Opportunities

Associating Historical and Future Data with Hospitality Opportunities

This chapter describes how to set up and manage historical and future opportunity information. It includes the following topics:

- *About Histories and Futures Functionality*
- *Scenario for Researching Historical Data*
- *Process of Setting Up Histories and Futures Data*
- *Process of Managing Histories and Futures Data*
- *Workflows for Histories and Futures Functionality*

About Histories and Futures Functionality

The Histories and Futures functionality of Siebel Hospitality allows you to capture, aggregate, and analyze historical and future Information about meetings and other events. This information can include sleeping rooms (reserved, booked, picked up, and complimentary) at 30, 60, and 90 day intervals, food and beverage (F&B) items, function spaces, and similar data.

Siebel Hospitality can store historical and future information for multiple years in the past and future. Historical and future information is made available to help users make selling, inventory management, and forecasting decisions. Historical and future information can be sent to another property along with an initial opportunity or quote.

Users of Histories and Futures functionality might include sales managers, event managers, directors of sales, and revenue managers. Histories and Futures functionality might also be used by a *global sales office (GSO)*, sometimes called a *virtual reservation office*, which books sleeping rooms, meeting rooms, group blocks, and so on, on behalf of the property.

You can capture and use historical and future information regardless of whether your property or another property fulfills the events. You can capture and use historical and future information from *competitor properties*, which are properties not under the same ownership as your property, and which might share only a minimum of information. You can also capture and use historical and future information from *sister properties*, which are properties under the same ownership as your property. Sister properties might share information, leads, employees, and management staff.

For example, suppose one of your customers held a meeting at your property last year. This customer purchased F&B items, a function space, and sleeping rooms for the meeting. This year, you can use the data from the meeting that occurred last year as a basis for booking another, similar event.

When the status of a quote becomes Definite, the record becomes historical information. After a record has reached a status of Definite, statistical information accumulates against the record. This statistical information includes, but is not limited to, room block details (blocked and actual), room revenues, and function revenues.

Histories and Futures Data

You can use Histories and Futures functionality to capture event history or future information such as the following:

- Event dates
- Fulfilling properties, whether sister properties or competitor properties
- Total revenues, including revenues derived from rooms, rentals, and F&B items
- Complimentary, suites, and comments
- Room block information, including agreed, blocked, picked-up (30 day prior, 60 day prior, and 90 day prior), actuals, wash percentage, no shows, and Average Daily Rate (ADR)
- Function information, if available, including agreed, expected, guaranteed, and actual attendees; equipment, audio-visual (AV), and F&B details; and comments
- Housing methods, including rooming lists, individual call-ins, and so on

Scenario for Researching Historical Data

This topic gives one example of how the Histories and Futures functionality might be used. You might use Histories and Futures functionality differently, depending on your business model.

A user at a property belonging to a major hotel chain is working on a lead for a major corporate client. This client is planning a product release in the user's town. The client has used sister properties for various events in the past. The client also conducted a similar product release last year at a competitor property in the same city.

For the product release, the client is asking for a number of rooms that will sell out the user's entire hotel. The user wants to gather information about product release that occurred last year, and research how other events booked by this client have turned out, before reserving the entire hotel.

First, the property user contacts the competitor hotel and asks for the event history of the product release that occurred last year. The user captures the historical information provided by the competitor in the historical data views of Siebel Hospitality.

Next, the user searches the historical data views of Siebel Hospitality for other events booked by this client at sister properties to see how the client has performed against past commitments. She also views and factors in the historical information she gathered from the competitor property. If the user finds enough history information that is relevant to the product release event, she applies it to her decision. If not, she goes on to analyze the historical data views for similar events conducted by other clients to establish the trend.

The user's research and analysis show that the client has been reasonably accurate in estimating event requirements and has consistently honored previous financial commitments. If her property is unable to accommodate this lead, the user can refer it to a sister property and pass along the history. In this case, however, the user decides that her property can accommodate the lead.

The user blocks guest rooms according to the contract terms and her judgment. Her decision is based on the historical data analysis. Depending on her judgment, the number of rooms blocked could be different from the contracted number of rooms.

Over the life span of the lead, the user and her colleagues capture details of the lead in the historical data views of Siebel Hospitality. Which details are captured is determined by predefined conditions. This information can then be used by the whole organization for future business with this client.

Process of Setting Up Histories and Futures Data

This topic lists the tasks typically performed by administrators when setting up Histories and Futures data. Your company might follow a different process according to its business requirements.

To set up Histories and Futures data, perform the following procedures:

- *Entering Records for Competitor Properties (Administrator)*
- *Configuring Fields for Histories and Futures (Administrator)*
- *Setting Up Event Templates for Histories and Futures (Administrator)*
- *Importing Historical and Future Data (Administrator)*
- *Exporting Historical and Future Data (Administrator)*
- *Setting User Properties for Histories and Futures (Administrator)*

Entering Records for Competitor Properties (Administrator)

Siebel Hospitality can capture historical and future information from competitor properties as well as for your property and its sister properties. To allow users to add historical and future records for competitor properties, you must create records for these competitor properties.

This task is a step in *Process of Setting Up Histories and Futures Data*.

To enter records for competitor properties

1. Follow the steps of *Adding Property Records*.
2. In the Property Type field, select Competitor.
3. Complete the other fields, as required.

Note: Properties that you designate as competitor properties can only be viewed and selected by users in the Histories screen, Quotes list.

Configuring Fields for Histories and Futures (Administrator)

Administrators can configure some fields in the Histories and Futures views to change or enhance the functionality according to the business model of your company. For more information about configuring fields in Siebel Business Applications, see the chapter on configuring business components in *Configuring Siebel Business Applications* .

This task is a step in *Process of Setting Up Histories and Futures Data*.

Setting Up Event Templates for Histories and Futures (Administrator)

Administrators can set up event templates to apply to opportunities, including historical and future opportunities. Event templates contain generic information that can be applied to opportunities created by users. This generic information can include associated function, room block, historical opportunity, and property records. For more information about setting up event templates, see *Process of Creating Event Templates*.

This task is a step in *Process of Setting Up Histories and Futures Data*.

Importing Historical and Future Data (Administrator)

You can import historical and future opportunities and related data into the Histories and Futures views from third-party applications. Siebel Hospitality includes the TNT History Oppty Insert Web service for importing data.

For more information about importing data into Siebel Business Applications, see the chapter on importing data in *Siebel Enterprise Integration Manager Administration Guide* . For more information about the TNT History Oppty Insert Web service, see *Siebel CRM Web Services Reference* .

This task is a step in *Process of Setting Up Histories and Futures Data*.

Exporting Historical and Future Data (Administrator)

Siebel Hospitality can export Histories and Futures information in several formats. For more information about exporting records from a Siebel application, see the chapter on sharing information in *Siebel Fundamentals* .

This task is a step in *Process of Setting Up Histories and Futures Data*.

Setting User Properties for Histories and Futures (Administrator)

Administrators can set user properties to modify or enhance the Histories and Futures views in Siebel Hospitality. For more information about these user properties, see *User Properties for Histories and Futures*.

This task is a step in *Process of Setting Up Histories and Futures Data*.

Process of Managing Histories and Futures Data

This topic lists the tasks typically performed by sales managers, event managers, directors of sales, and revenue managers when managing and using histories and futures records. Your company might follow a different process according to its business requirements.

To manage histories and futures records, perform the following procedures:

1. *Entering Historical Data in the Histories Screen (User)*
2. *Associating Historical and Future Opportunities with a Present Opportunity (User)*
3. *Applying an Event Template to a Historical Opportunity(User)*
4. *Sharing Historical and Future Opportunities with Another Property (User)*

Entering Historical Data in the Histories Screen (User)

The Histories screen lists historical opportunities, quotes associated with a selected opportunity, and functions and room blocks associated with a selected quote. You can enter all this information to create a collection of historical data with which to associate current opportunities.

Historical opportunities are made to appear in this screen in the following ways:

- You can manually enter a new opportunity and, optionally, enter associated quotes, functions, and room blocks. In this case, the historical record is editable.
- When an existing quote has a status of Definite, Siebel Hospitality automatically displays the associated opportunity, the quote, and associated functions and room blocks in the Histories screen. In this case, the historical record is read only.

Note: You can enter only historical opportunities in the Histories screen. You cannot enter future opportunities. For information about entering future opportunities for the Histories and Futures functionality, see *Associating Historical and Future Opportunities with a Present Opportunity (User)*.

To manually enter a new historical opportunity, the quotes associated with the opportunity, and the functions and room blocks associated with the quotes, follow the procedures in this topic.

Entering Historical Opportunities Manually

To manually enter a historical opportunity, follow this procedure.

This task is a step in *Process of Managing Histories and Futures Data*.

To enter a historical opportunity manually

1. Navigate to the Histories screen, Histories view.
2. In the Historical Opportunities list, add a record.
3. Complete the fields, as required.

   Some fields are described in the table that follows.

Field	Comments
Opportunity	Opportunity name from the Opportunity Capture view.
Intermediary Account	Name of the secondary account, if any.
Segment	Customer or market category classification for this opportunity.

Field	Comments
Type	Means of classifying the opportunity, for example, Board Meeting, Job Fair, and so on.
Event Template	Event template that has been applied to this opportunity.
Peak # Rooms	Calculated field. The sum of the values of the Peak # Rooms fields of all the quotes associated with this opportunity.
Contracted Rooms	Calculated field. The sum of the Contracted Rooms fields of all the quotes associated with this opportunity.
Blocked Rooms	Calculated field. The sum of the Blocked Rooms fields of all the quotes associated with this opportunity.
Picked Up Rooms	Calculated field. The sum of the Picked Up Rooms fields of all the actualized quotes associated with this opportunity.
Actual Rooms	Calculated field. The sum of the Actual Rooms fields of all the quotes associated with this opportunity.
Projected Rooms	Calculated field. The sum of the Projected Rooms fields of all the quotes associated with this opportunity.
Complimentary Rooms	Calculated field. The sum of the Complimentary Rooms fields of all the quotes associated with this opportunity.
Locked	Select to make this record read only.

About Locking, Unlocking, and Deleting Historical Opportunities

When the Locked field of a historical opportunity record is selected, the record is locked, becoming inactive and read only. In a record that was automatically created in this view when a quote changed to Definite, Locked is automatically selected.

When a historical opportunity record is locked, it remains visible to users. However, only the creator of that record can unlock and edit it. If record was created in the Histories view, only the user who created the record in the Histories view can lock the record, or unlock and edit it. Additionally, depending on the business model of your company, the ability to lock and unlock records might be limited to users with specific permissions or responsibilities.

When a historical opportunity record is locked, only the system administrator can delete the record.

Entering Historical Quotes Manually

To manually enter a quote associated with a historical opportunity, follow this procedure.

This task is a step in *Process of Managing Histories and Futures Data*.

To enter a historical quote manually

1. Navigate to the Histories screen, histories view.
2. In the Historical Opportunities list, select an opportunity with which to associate a quote.
3. Scroll down to the center of the view.
4. In the Quotes list, add a quote record to the currently selected opportunity.
5. Complete the fields, as required.

   Some fields are described in the following table.

Field	Comments
Property	Name of the property in which the quote event occurred. Clicking the link displays the Property screen, Properties view.
Peak # Rooms	Calculated field. Compiled from the Room Block totals associated with the current quote record.
Picked Up	Calculated field. Compiled from the Picked Up totals associated with the current quote record.
Total Revenue	Calculated field. Compiled from the revenue figures (Room Block, Functions, and so on) associated with the current quote record.
% Double Occupancy	Calculated field. The percentage of Double Rooms against Total Rooms Blocked. The calculation is as follows: (Double Room Percent divided by Total Rooms Blocked) multiplied by 100.0 The Double Room Percent is displayed in the Quote screen, Room Block Info view, in the Double % field under the Occupancy % heading.
% No Shows	Calculated field. It is compiled from the difference between the Agreed and Actual counts.

Entering Historical Functions Manually

To manually enter a function associated with a historical quote, follow this procedure.

This task is a step in *Process of Managing Histories and Futures Data*.

To enter a historical function manually

1. Navigate to the Histories screen, histories view.
2. In the Historical Opportunities list, select an opportunity.
3. Scroll down to the center of the view.
4. In the Quotes list, select a quote in which to add a function.
5. In the Functions list, add a function record to the currently selected quote.
6. Complete the fields, as required.

   Some fields are described in the following table.

Field	Comments
Room Rental Revenue	Total revenue value for the Room Rental revenue category for this function.
Food Revenue	Total revenue value for the Food revenue category for this function.
Beverage Revenue	Total revenue value for the Beverage revenue category for this function.

Note: Grand totals for the numeric and currency fields appear in a row at the end of the list.

Entering Historical Room Blocks Manually

To manually enter a room block associated with a historical quote, follow this procedure.

This task is a step in *Process of Managing Histories and Futures Data*.

To enter a historical room block manually

1. Navigate to the Histories screen, histories view.
2. In the Historical Opportunities list, select an opportunity.
3. In the Quotes list, select a quote in which to add a room block.
4. Scroll down to the end of the view.
5. In the Room Blocks list, add a room block record to the currently selected quote.
6. Complete the fields, as required.

   Some fields are described in the following table.

Field	Comments
Picked Up	Calculated field. The sum of all room types from all dates associated with the current opportunity.
30 Day Pick Up	Read only. The number of rooms picked up on the 30th day before the arrival date on the quote.

Field	Comments
60 Day Pick Up	Read only. The number of rooms picked up on the 60th day before the arrival date on the quote.
90 Day Pick Up	Read only. The number of rooms picked up on the 90th day before the arrival date on the quote.
Actual vs Contracted	Calculated field. It is derived from the following formula: (Actual divided by Contracted) multiplied by 100.0
Actual vs Blocked	Calculated field. It is derived from the following formula: (Actual divided by Blocked) multiplied by 100.0

Note: Grand totals for the numeric fields appear in a row at the end of the list.

About 30, 60, and 90 Day Pick-Ups

The Room Blocks list is also referred to as the 30-60-90 day snapshot. Siebel Hospitality captures picked-up rooms data associated with event room blocks at 30, 60, and 90 days prior to the arrival date and displays these figures in the 30 Day Pick Up, 60 Day Pick Up, and 90 Day Pick Up fields. The 30, 60, and 90 day counts come from active quote records that are not yet part of the Histories and Futures records.

Siebel Hospitality captures these figures *only* on the 30th, 60th, and 90th days before the arrival date. For example, if an event is entered on the 75th day before the occurrence of the event, the 30 Day Pick Up, 60 Day Pick Up, and 90 Day Pick Up fields are blank. Only when the event reaches 60 and 30 days before the arrival date are the respective 60 Day Pick Up and 30 Day Pick Up fields populated. The 90 Day Pick Up field remains blank.

If an existing event is rescheduled to a date that is either sooner or later than the original date, Siebel Hospitality clears the fields, recapturing and repopulating them at the new 30th, 60th, and 90th days before arrival. For example, suppose the arrival date of an event is 45 days from today, and the event record has data for the 60th and 90th days before the arrival date. If the event is postponed to 50 days from today, the 60 Day Pick Up and 90 Day Pick Up fields are cleared, and the 30 Day Pick Up field is populated when the new 30th day before arrival occurs (that is, 20 days from today).

Associating Historical and Future Opportunities with a Present Opportunity (User)

You can compare past and future opportunities with a present opportunity by manually associating past and future opportunities with a selected, current opportunity. You can use the comparison as a basis for assessing the present opportunity.

To associate historical opportunities and future opportunities with a present opportunity, follow the procedures in this topic.

Associating Historical Opportunities with an Opportunity

To associate a historical opportunity with a present opportunity, follow this procedure.

This task is a step in *Process of Managing Histories and Futures Data*.

To associate a historical opportunity with an opportunity

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. In the Opportunities List, locate an opportunity with which to associate a historical or future opportunity.
3. Click the link in the Opportunity Name field.
4. Click the Histories and Futures view tab.
5. Scroll down to the lower part of the view, and create a new record in the Historical Opportunities list.
6. In the Opportunity field of the historical opportunity, click the single select button.

   The Add Historical Opportunities dialog box appears with a row of query fields.
7. Enter query criteria for the historical opportunities you might want to associate with the current opportunity, and click Go.

   The Add Historical Opportunities dialog box displays a list of historical opportunities that meet the query criteria you entered.

   > **Note:** The Add Historical Opportunities dialog box displays only historical opportunities that are visible in the Histories screen.

8. Do one of the following:
   - Select an existing historical opportunity to associate with the current opportunity, and click OK.
   - Create a new historical opportunity by clicking New, completing the fields in the Add Historical Opportunities dialog box, and clicking Save.

   The opportunity you selected or created appears in the Historical Opportunities list.
9. To view details of a historical opportunity such as associated quotes, functions, and room blocks, drill down on the Opportunity field.

   Siebel Hospitality displays details of the opportunity in the Histories view.

Associating Future Opportunities with an Opportunity

To associate a future opportunity with a present opportunity, follow this procedure.

This task is a step in *Process of Managing Histories and Futures Data*.

To associate a future opportunity with an opportunity

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. In the Opportunities List, locate an opportunity with which to associate a historical or future opportunity.
3. Click the link in the Opportunity Name field.
4. Click the Histories and Futures view tab.
5. Scroll down to the lower part of the view, and create a new record in the Future Opportunities list.
6. In the Opportunity field of the future opportunity, click the single select button.

The Add Future Opportunities dialog box appears with a row of query fields.

7. Enter query criteria for the future opportunities to associate with the current opportunity, and click Go.

   The Add Future Opportunities list displays a list of future opportunities that meet the query criteria you entered.

   Note: The Add Future Opportunities dialog box displays only opportunities dated later than the current date.

8. Select a future opportunity to associate with the current opportunity, and click OK.

   The opportunity you selected appears in the Future Opportunities list.

9. To view details of a future opportunity such as associated properties, dates, and functions, drill down on the Opportunity field.

   Siebel Hospitality displays details of the opportunity in the Opportunity Capture view.

Applying an Event Template to a Historical Opportunity (User)

After an opportunity has been created, you can apply an event template to define standard information about that opportunity. When you apply an event template to an opportunity, you overwrite the existing information in the opportunity with information from the template. To associate event templates with historical opportunities, follow the procedure in *Applying an Event Template to an Opportunity*.

This task is a step in *Process of Managing Histories and Futures Data*.

Sharing Historical and Future Opportunities with Another Property (User)

Depending on your responsibilities and permissions, you might have visibility only to your property or group of properties. If you want to send historical or future opportunity information for your property to a property outside your area of visibility, create a proposal draft with the historical or future opportunity information. Another user who has access to the target property can then attach the proposal to an opportunity associated with the target property. For more information about creating and managing proposals, see the chapter on proposals in *Siebel Correspondence, Proposals, and Presentations Guide* .

To share a historical or future opportunity with another property, follow the procedures in this topic.

Making Historical and Future Opportunities Available to Other Properties

To make historical or future opportunity information available to other properties by adding the information to a proposal, follow this procedure.

This task is a step in *Process of Managing Histories and Futures Data*.

To make a historical or future opportunity available to other properties

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. In the Opportunities list, query for and select a historical or future opportunity to send to another property.
3. In the opportunity record, click the link in the Opportunity Name field.

4. Click the Proposals view tab.
5. Follow the steps for creating a proposal and generating a proposal draft, as described in the chapter on proposals in *Siebel Correspondence, Proposals, and Presentations Guide* .

   Siebel Hospitality exports the opportunity information to a Microsoft Word document.
6. Save the proposal draft document to a location on your company network that is public or accessible to the target property.

Accessing Historical and Future Opportunities from Other Properties

To access historical or future opportunity information in a proposal generated from another property, follow this procedure.

This task is a step in *Process of Managing Histories and Futures Data*.

To access a historical or future opportunity from another property

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. In the Opportunities list, query for and select a historical or future opportunity to send to another property.
3. In the opportunity record, click the link in the Opportunity Name field.
4. Click the Proposals view tab.
5. In the Proposals list, add a new record.
6. In the Draft Name field, click the single select button.
7. In the Add Attachment dialog box, click Browse and navigate to the network location of the proposal document that contains the historical or future opportunity information you want to access.
8. Select the proposal document, and click OK.
9. In the Name field, enter a name for the proposal.

   The historical or future opportunity information is visible to the current property in the document attachment to the opportunity.

Workflows for Histories and Futures Functionality

This topic describes the workflows for Histories and Futures functionality that are specific to Siebel Hospitality. By modifying these workflows, you can configure Histories and Futures functionality according to the business requirements of your company. For more information about workflows, and about customizing workflows, see *Siebel Business Process Framework: Workflow Guide* .

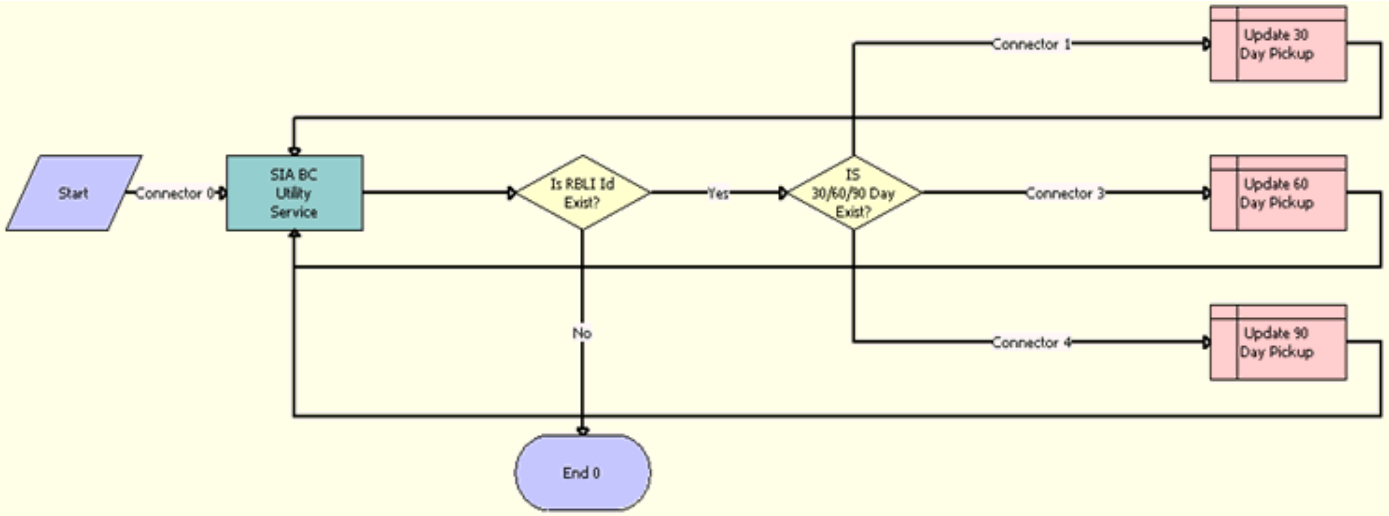
This topic includes the following topics:

- *TNT Nightly 30 60 90 Day Pickup Workflow*
- *TNT Nightly Update History Opportunity Workflow*
- *TNT Update History Opportunity Workflow*
- *TNT SHM Create Function Order Workflow*
- *TNT SHM Create One Quote Workflow*

TNT Nightly 30 60 90 Day Pickup Workflow

This workflow checks for quotes whose arrival dates are 30, 60, and 90 days from the current date. It updates the 30 Day Pick Up, 60 Day Pick Up, and 90 Day Pick Up fields of their associated room block line items. The following image shows this workflow.

This workflow is started once each day through a repeating job at a specified time.



Workflow Description. This workflow performs the following actions:

1. **SIA BC Utility Service**. The workflow loops through all room block line items whose quote arrival dates are 30, 60, and 90 days from the current date.
2. **Is RBLI Id Exist?** This decision step identifies the next step in the workflow. If no room block line items are available in Step 1, the workflow goes to End. If room block line items are available in Step 1, the workflow proceeds to Step 3.
3. **IS 30/60/90 Day Exist?** If any of the room block line items exist, this workflow step checks whether the quote arrival date is 30, 60, or 90 days from the current date.
4. **Update 30 Day Pickup**. If the quote arrival date is 30 days from the current date, this workflow step updates the 30 Day Pick Up field in the Room Block Line Items BC with the current Picked Up field value.
5. **Update 60 Day Pickup**. If the quote arrival date is 60 days from the current date, this workflow step updates the 60 Day Pick Up field in the Room Block Line Items BC with the current Picked Up field value.
6. **Update 90 Day Pickup**. If the quote arrival date is 90 days from the current date, this workflow step updates the 90 Day Pick Up field in the Room Block Line Items BC with the current Picked Up field value.

Associated Business Service Methods

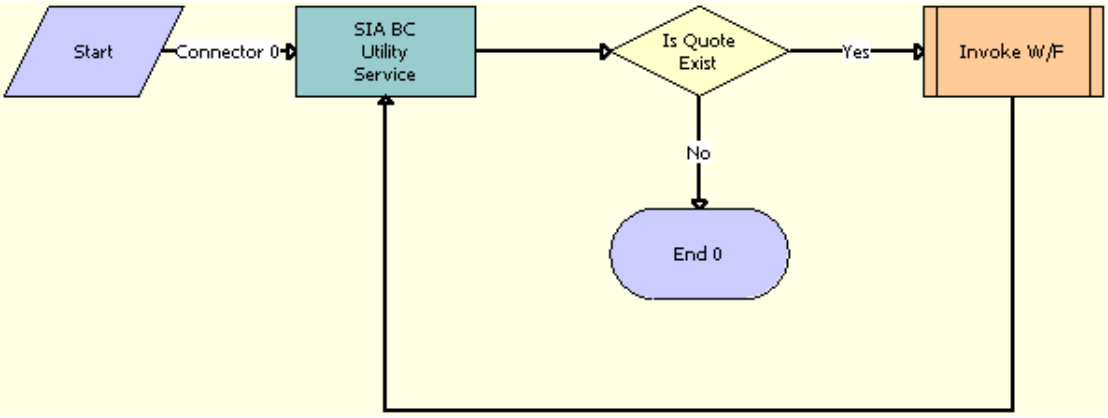
The following table shows the step in this workflow that calls a business service method.

Workflow Step	Business Service Method Called
SIA BC Utility Service	BCNextRecord

TNT Nightly Update History Opportunity Workflow

This workflow checks for definite quotes that have been modified and updates their associated historical opportunities. The following image shows this workflow.

This workflow is started once each day through a repeating job at a specified time.



Workflow Description. This workflow performs the following actions:

1. **SIA BC Utility Service**. The workflow step loops through all Definite quote records and looks for quotes whose functions, room blocks, or other associated data have been modified.
2. **Is Quote Exist.** If quotes that meet the requirements in Step 1 are found, this decision step continues the workflow to Step 3. If quotes that meet the requirements of Step 1 are not found, this decision step ends the workflow.
3. **Invoke W/F**. If any of the Definite quotes have been modified, this workflow step calls the *TNT Update History Opportunity Workflow*, which updates the modified data in the associated historical opportunity records.

Associated Business Service Methods

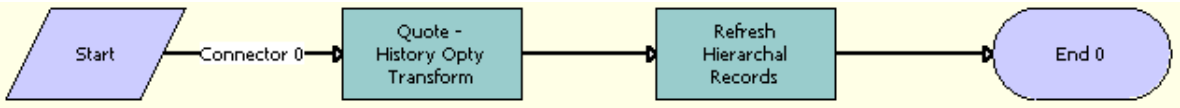
The following table shows the step in this workflow that calls a business service method.

Workflow Step	Business Service Method Called
SIA BC Utility Service	BCNextRecord

TNT Update History Opportunity Workflow

This workflow updates a historical opportunity and the data associated with the opportunity. The following image shows this workflow.

This workflow is called by the *TNT Nightly Update History Opportunity Workflow*.



Workflow Description. This workflow performs the following actions:

1. **Quote - History Opty Transform**. This workflow step transfers the quote-related data, which includes Opportunity, Quote, Functions, and Room Block details, to a historical opportunity using Data Map Objects.
2. **Refresh Hierarchal Records**. This workflow step calls the Refresh Hierarchal business components when hierarchal records are transferred through the Data Transfer Utilities (DTU), to maintain the hierarchy in the destination business component.

Associated Business Service Methods

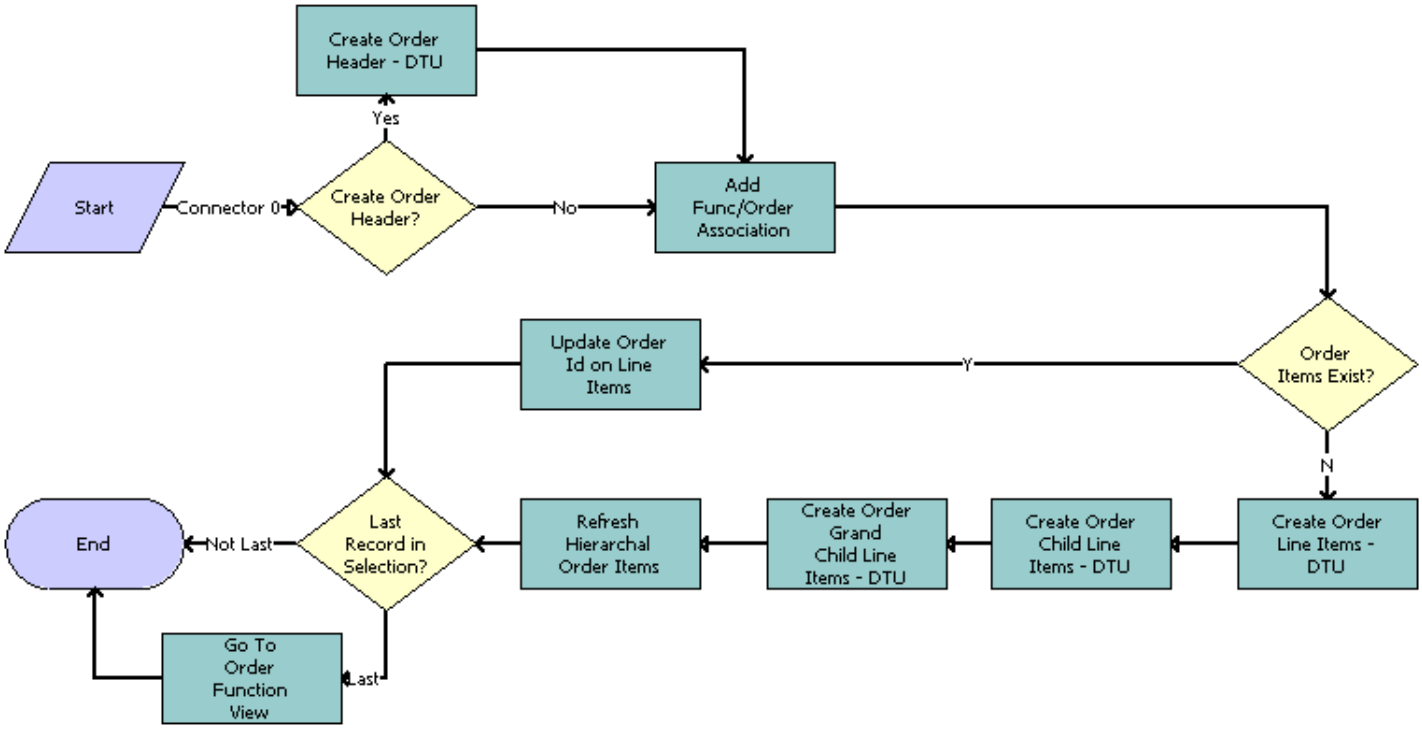
The following table shows the steps in this workflow that call business service methods.

Workflow Step	Business Service Method Called
Quote - History Opty Transform	DataTransfer
Refresh Hierarchal Records	RefreshHierchyBCs

TNT SHM Create Function Order Workflow

This workflow creates an order for a function. If an order already exists for the function, this workflow updates the Order Id fields in the function and the function line items and navigates to the Orders screen. The following image shows this workflow.

This workflow is started when a user clicks Menu and chooses Create Function Order in the Quote screen, Function applet.



Workflow Description. This workflow performs the following actions:

1. **Create Order Header?** This workflow step checks whether or not to create order header information. If the function does not have an order, this step returns True.
2. **Create Order Header - DTU**. This workflow step creates an order with header information.
3. **Add Func/Order Association**. This workflow step associates the quote functions with the order.
4. **Order Items Exist?** If an order exists, this workflow step returns True.
5. **Update Order Id on Line Items**. If an order exists, this workflow step updates the Order Id for the function and the function line items.
6. **Create Order Line Items - DTU**. If an order does not exist, this workflow step creates an order along with the function and the function line items. The QuoteFunctionSearchSpec input argument prevents the line items for subfunctions and grandchild functions from being created twice.
7. **Create Order Child Line Items - DTU**. This workflow step associates a subfunction and the subfunction line items with the order created in the preceding step. The QuoteFunctionSearchSpec input argument prevents the line items for subfunctions and grandchild functions from being created twice.
8. **Create Order Grand Child Line Items - DTU**. This workflow step associates the grandchild function and the grandchild function line items with the order created in Step 6.
9. **Refresh Hierarchal Order Items**. When hierarchal records are transferred through the Data Transfer Utilities (DTU), then in order to maintain the hierarchy in the destination business component, the workflow calls the Refresh Hierarchal business components.
10. **Last Record in Selection?** In a multiple selection, this workflow step checks whether or not the selected record is the last record.
11. **Go To Order Function View**. If the selected record is the last record, this workflow step navigates to the Order screen, Functions view. If the selected record is not the last record, then the workflow ends and is called again for the next selected record.

Associated Business Service Methods

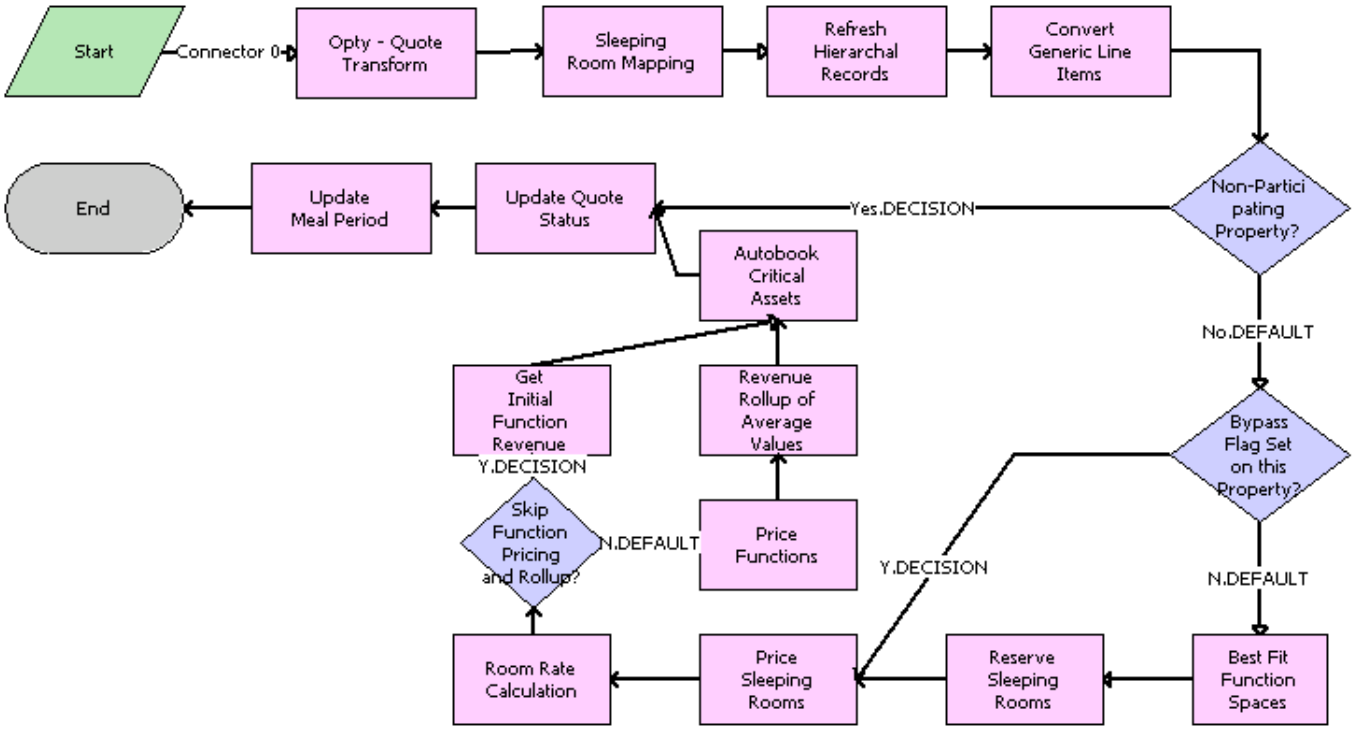
The following table shows the steps in this workflow that call business service methods.

Workflow Step	Business Service Method Called
Create Order Header - DTU	DataTransfer
Add Func/Order Association	AddFunctionOrderAssoc
Create Order Line Items - DTU	DataTransfer
Create Order Child Line Items - DTU	DataTransfer
Create Order Grand Child Line Items - DTU	DataTransfer
Refresh Hierarchal Order Items	RefreshHierchyBCs
Update Order Id on Line Items	UpdateOrderLineItems
Go To Order Function View	GotoView

TNT SHM Create One Quote Workflow

This workflow creates a quote with functions and room blocks. The following image shows this workflow.

This workflow is started when a user clicks the Create Quote button in the Opportunity screen, Capture list applet.



Workflow Description. This workflow performs the following actions:

1. **Opty - Quote Transform**. The workflow step transfers the opportunity-related data along with functions and function line items, notes, macro estimates, and concessions to the quote through Data Map Objects.
2. **Sleeping Room Mapping**. This workflow step maps generic room blocks to specific room blocks.
3. **Refresh Hierarchal Records**. When hierarchal records are transferred through the Data Transfer Utilities (DTU) to maintain the hierarchy in the destination business component, the workflow calls the Refresh Hierarchal business components.
4. **Convert Generic Line Items**. This workflow step converts generic function line items to specific function line items.
5. **Non-Participating Property?** This workflow step checks whether or not the opportunity property is a participating property.
6. **Bypass Flag Set on this Property?** If the opportunity property is a participating property, this workflow step checks whether or not the Bypass flag is set for the function.
7. **Best Fit Function Spaces**. If the Bypass flag is not set, this workflow step checks the availability of function spaces using a best-fit algorithm and reserves the available function spaces.
8. **Reserve Sleeping Rooms**. This workflow step checks the availability of sleeping rooms and reserves the available sleeping rooms.
9. **Price Sleeping Rooms**. This workflow step retrieves the price for the created property-specific sleeping rooms.
10. **Room Rate Calculation**. This workflow step creates the negotiated room records for the property-specific sleeping rooms.
11. **Skip Function Pricing and Rollup?** If the Skip Function Pricing and Rollup process property is set by the user, this workflow step skips the function pricing and rollup.
12. **Price Functions**. This workflow step retrieves the prices for the created functions and line items.
13. **Revenue Rollup of Average Values**. This workflow step rolls up the revenue of all the functions and function line items and updates the Total Quote Revenue.
14. **Get Initial Function Revenue**. If Skip Function Pricing and Rollup is set to True, this workflow step retrieves the initial function space revenue.
15. **Auto book Critical Assets**. This workflow step books the critical line items required for the functions on a specific date and time.
16. **Update Quote Status**. This workflow step sets the Status of the quote to Prospect.
17. **Update Meal Period**. After a quote is generated from an opportunity and if the function type is associated with the property in the Property Pricing Administration screen, this method updates the function type. The function type update in turn updates the read-only Meal Period field.

Associated Business Service Methods

The following table shows the steps in this workflow that call business service methods.

Workflow Step	Business Service Method Called
Opty - Quote Transform	DataTransfer
Sleeping Room Mapping	DataTransfer
Refresh Hierarchal Records	RefreshHierchyBCs
Convert Generic Line Items	Map Generic Products

Workflow Step	Business Service Method Called
Best Fit Function Spaces	FSI Best Fit
Reserve Sleeping Rooms	Reserve SR
Price Sleeping Rooms	Reprice All Room Blocks
Room Rate Calculation	RoomRateCalculation
Price Functions	FnRepriceAll
Revenue Rollup of Average Values	RefreshAllFunctions
Get Initial Function Revenue	GetInitalFSRev
Autobook Critical Assets	Quote Book
Update Quote Status	Update Quote Status
Update Meal Period	Update Meal Period

17 Managing Recurring Events

Managing Recurring Events

This chapter describes the procedures that sales managers and event managers perform to create and add details to a recurring event, using Siebel Hospitality software. It includes the following topics:

- *About Recurring Events*
- *Process of Creating Recurring Events*
- *Creating Recurring Events*
- *Creating the Recurring Event Opportunity*
- *Creating Subopportunities for Event Opportunities*
- *Setting the Recurrence for Subopportunities*
- *Generating Quotes for Recurring Events*
- *Generating Quotes for Subopportunities*
- *Compiling Aggregate Quotes for Recurring Events*
- *Compiling What-If Aggregate Quotes for Recurring Events*
- *Completing an Aggregate Quote Evaluation*
- *Overriding the Prices of All Rooms for an Aggregate Quote*
- *Changing the Projected Property for a Subopportunity Quote*
- *Submitting an Aggregate Quote for Evaluation*

About Recurring Events

Recurring events are a repeating series of events that take place at specified time intervals, but that are associated with only one opportunity. For example, a meeting that is held every month for a year, or a room block for an airline crew, are recurring events. There are two types of recurring events in Siebel Hospitality as follows:

- **Ordinary Recurring Events.** These are repeating events that take place at a given property at regular time intervals, for example, a meeting on the first Monday of every month at a specific property.
- **Circular Tours.** These are repeating events that take place at different properties in the chain of properties owned by a company.

Recurring events can be created for both participating and nonparticipating properties.

Process of Creating Recurring Events

This topic lists the tasks typically performed by hospitality sales representatives when creating an opportunity for an event. Your company might follow a different process according to its business requirements.

To create recurring events, perform the following tasks:

- *Creating Recurring Events*
- *Creating the Recurring Event Opportunity*
- *Creating Subopportunities for Event Opportunities*
- *Setting the Recurrence for Subopportunities*
- *Generating Quotes for Recurring Events*
- *Generating Quotes for Subopportunities*
- *Compiling Aggregate Quotes for Recurring Events*
- *Compiling What-If Aggregate Quotes for Recurring Events*
- *Completing an Aggregate Quote Evaluation*
- *Overriding the Prices of All Rooms for an Aggregate Quote*
- *Changing the Projected Property for a Subopportunity Quote*
- *Submitting an Aggregate Quote for Evaluation*

Creating Recurring Events

Recurring events are created in much the same manner as ordinary opportunities. The recurring series of events is represented by one parent opportunity. However, because each event in the series takes place at a different time than other events, the opportunity is divided into a number of subopportunities that represent each individual event.

This topic includes the following topics and is a step in *Process of Creating Recurring Events*:

- *Creating the Recurring Event Opportunity*
- *Creating Subopportunities for Event Opportunities*
- *Setting the Recurrence for Subopportunities*

Creating the Recurring Event Opportunity

A recurring event opportunity is created in the same manner as other opportunities. However, when you create a recurring opportunity, you cannot select a property, create a function agenda, or create a room block for that opportunity. However, you can perform these operations for the subopportunities of the recurring opportunity. Also, you cannot generate a quote for the opportunity. Instead, you must generate quotes for the subopportunities of that opportunity.

This task is a step in *Creating Recurring Events*.

To create a recurring event opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, create a new record, and select Recurring for the Relationship Type of the record.
3. Complete the remaining fields, and save the record.

For more information on these fields, see *Creating Event Opportunities*.

Creating Subopportunities for Event Opportunities

After the recurring event opportunity has been created, you add subopportunities that represent each individual event in the series of events.

When you have created the subopportunities, you can provide more detailed information, for example, notes, activities, contact information, and so on, about these opportunities. For more information, see *Capturing Hospitality Opportunities*

> **Note:** You can apply event templates to a subopportunity from the Sub Opportunity list Menu. For more information about applying event templates, see *Applying an Event Template to an Opportunity*.

This task is a step in *Process of Creating Recurring Events*.

To create subopportunities for an event opportunity

1. Create an opportunity as described in *Creating the Recurring Event Opportunity*.
2. Click the link in the Name field, and then click the Sub Opportunities view tab.
3. In the Sub Opportunities list, create a new record.

   The Name, Opportunity #, Arrival Date, Sales Stage, and Relationship type fields are automatically populated.
4. Change the Name, Arrival Date, # of Nights, and Projected Property fields as required.
5. Scroll down to the Room Block Items list, and create room blocks and line items as necessary by performing the following steps.

   a. Complete the Room Blocks field to create a Room Block.
   b. Complete the remainder of the fields to create a line item for the room block.
   c. (Optional) To view the standard layout for Room Blocks, click the link in the Name field of the subopportunity, and then click the Room Blocks tab.

      You can enter information in this view if needed.

   For more information about Room Blocks, see *Adding Room Block Information to an Event Opportunity*.
6. In the Agenda Functions list, create new records as necessary.

   For more information about Function Agendas, see *Adding a Function Agenda and Line Items to an Event Opportunity*.

Setting the Recurrence for Subopportunities

When you have created a subopportunity that contains Room Block Info, Room Block Items, and a Function Agenda, you can set the recurrence for this subopportunity. By setting the recurrence, all the individual events in the series are created in the Sub Opportunities list.

This task is a step in *Process of Creating Recurring Events*.

To set the recurrence for subopportunities

1. Create a subopportunity as described in *Creating Subopportunities for Event Opportunities*.
2. In the Sub Opportunities list, select the subopportunity, and click Recurrence.

   The Recurrence view appears.
3. In the drop-down list, select how often the event is to occur.
4. Available options are Daily, Weekly, Monthly, or Yearly.
5. In the Recurrence Pattern form, fill in the appropriate recurrence pattern details.
6. If you selected a yearly recurrence, select either the By Date check box or By Day, Week #, and Month check box, and complete the necessary fields.
7. In the Range of Recurrence form, fill in the Arrival Date, and perform one of the following steps to indicate whether you want the recurring events to end by Date or by Occurrence:
   - To end the recurring events by Date, specify the date on which the series of events ends.
   - To end the recurring Events by Occurrence, specify the number of recurring events that are in the series of events.
8. Click OK.

   The new recurring opportunities are populated to the Sub Opportunities list. The name of each recurring opportunity is automatically populated with a number. Each of these numbers are part of a continuing series. For example, if three recurring opportunities have been created, the names of the opportunities might be as follows: 296-41527311, 296-41527312, and 296-41527313.

Generating Quotes for Recurring Events

Quotes cannot be generated from parent recurring opportunities. Quotes can be generated, however, for individual events in a series of recurring events.

After all the individual quotes are generated, you can create an aggregate quote for the parent recurring opportunity. The aggregate quote, which is compiled from the Aggregate Quotes view, provides revenue and other details for an entire set of subquotes. The aggregate quote is compiled from all projected properties, and as the name suggests, it aggregates totals from all quotes regardless of the property where the events are to take place.

Quotes might be generated for a number of different properties before customers decide which property is most suitable to their requirements. When bidding competitively against other properties for an opportunity, it might be necessary for a sales representative from a particular property to see an aggregate quote for a recurring event if the entire recurring event were to take place at the sales representative's property. These types of quotes are called What-If Aggregate Quotes and can be generated by a sales representative when necessary. When you generate a What-If Aggregate quote, the projected property for each quote does not change.

This topic contains the following topics and is a step in *Process of Creating Recurring Events*:

- *Generating Quotes for Subopportunities*
- *Compiling Aggregate Quotes for Recurring Events*
- *Compiling What-If Aggregate Quotes for Recurring Events*

Generating Quotes for Subopportunities

Subopportunity quotes must be generated before aggregate quotes can be compiled. The subopportunity quotes can be modified after they have been generated.

When you have generated a subopportunity quote, you can provide more details about the quote, for example, revenue estimates, macro estimates, function agenda, room block information, and so on, about these quotes. For more information, see *Managing Property-Specific Event Quotes*

This task is a step in *Process of Creating Recurring Events*.

To generate quotes for subopportunities

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Sub Opportunities view tab, and in the Sub Opportunities list, select one or more opportunities for which to generate quotes.
5. Click Create Quote.

   One or more quotes are created, and the Sub Opportunity Quotes view is displayed, showing the property and quote associated with the subopportunity.

   Note: You can add other properties to the list of properties and generate quotes for these properties also.

Compiling Aggregate Quotes for Recurring Events

An *aggregate quote* is one that provides summary details of all subopportunity details for the recurring event. When an aggregate quote is complied in the Aggregate Quotes view, the aggregate property quotes for that aggregate quote, and related quotes for the aggregate property quotes are also displayed in the Aggregate Quote view.

Before an aggregate quote can be compiled, subopportunity quotes for the recurring event must be generated.

When you compile an aggregate quote, the following things can occur:

- If there is no aggregate quote for the recurring event, then a new aggregate quote is complied, as well as any related property quotes and their related quotes.
- If an aggregate quote exists, and values at the lowest level (such as sleeping room and function agenda) have changed, then the quote is updated with the latest values.
- If an aggregate quote exists, and new subopportunity quotes have been generated for new properties, then the aggregate quote and aggregate property quotes are refreshed to reflect the changes.

When you have created an aggregate quote, you can view more detailed information about this quote through the Aggregate Quotes screen.

There are three lists in the Aggregate Quotes screen as follows:

- **Aggregate Quotes - Total.** This list provides the total aggregate quote for all properties. Only one quote can exist in this list.
- **Aggregate Quotes - Property.** This list provides the total aggregate quote for each property. There can only be one quote for each property in this list. The aggregate quote for each property totals all the quotes for events that are to be carried out at that property.
- **Related Quotes.** This is a list of all the quotes for a particular property in the series of recurring events. If you select the aggregate quote for a property in the Aggregate Quote - Property list, you can see all the quotes related to that property in this list.

This task is a step in *Process of Creating Recurring Events*.

To compile an aggregate quote for a recurring event

1. Generate quotes for the subopportunities of the recurring event as described in *Generating Quotes for Subopportunities*.
2. Click the Aggregate Quotes view tab.
3. From the Aggregate Quotes view, click Aggregate Quote.

   The aggregate quote (Aggregate Quote - Total) is compiled, as are aggregate quotes for all properties (Aggregate Quote - Property) associated with the recurring event.
4. To review all information associated with the aggregate quote, such as Functions, Room Blocks, Property Quotes, and related quotes, click the link in the Quote Name field.

   The Aggregate Quotes screen appears, where you can review the information.

Compiling What-If Aggregate Quotes for Recurring Events

What-If aggregate quotes allow you to create an aggregate quote for one property. This method is typically used when a number of different properties are competing for the same opportunity, and a sales representative or sales manager for a property wants to see whether the value of the opportunity for the property was involved. This information can then be used in competitive bidding to show a customer that a certain property is less expensive than another property. You can compile what-if aggregate quotes for an unlimited number of properties.

This task is a step in *Process of Creating Recurring Events*.

To compile a what-if aggregate quote for a recurring event

1. Generate quotes for the subopportunities of the recurring event as described in *Generating Quotes for Subopportunities*.
2. Click the Aggregate Quotes view tab, and then click the Aggregate Quote (What If) link.
3. Click the Aggregate Quote button.

   If a number of different properties are associated with the subopportunities of the recurring event, then a dialog box appears, instructing you to select a property.
4. Select the required property for the what-if aggregate quote, and click OK.

The what-if aggregate quote is compiled and appears in the list, as do the related quotes for the property.

Completing an Aggregate Quote Evaluation

Using the Aggregate Quote screen, Evaluation view, the sales representative documents the revenue information that the revenue manager considers when making the decision to approve or reject the quote for the event. The evaluation form typically provides the following information:

- Incremental revenue sources that can result from the group or event. The sales representative can enter more than one incremental revenue source.
- Notes on potential future business that can result from the event.
- Commission information. More than one commission can be entered.
- The date by which the evaluation must be completed so that the sales representative can respond to the customer.
- The sales manager's comments.

This task is a step in *Process of Creating Recurring Events*.

To complete an aggregate quote evaluation

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the required opportunity.
3. Click the link in the Name field, and then click the Aggregate Quotes view tab.
4. In the Aggregate Quotes - Total list, click the link in the Quote Name field.

   The Aggregate Quotes screen is displayed.
5. Click the Evaluations view tab, and complete the fields.

   For more information about the fields on the Evaluations view, see *Completing the Revenue Evaluation Form*.

Overriding the Prices of All Rooms for an Aggregate Quote

A sales representative can create a price override that mass-updates all rates for all room types available at all properties. This means that at whatever property the recurring event occurs, the same rate can be offered to the customer for sleeping rooms.

This task is a step in *Process of Creating Recurring Events*.

To override the prices of all rooms for an aggregate quote

1. Navigate to the Aggregate Quotes screen, then the Aggregate Quotes view.
2. In the Aggregate Quote list, query for and select the required aggregate quote.

3. Click the link in the Name field, and then click the Room Blocks view tab.
4. In the Aggregate Quote form menu, choose Price Override.

   The Price Override dialog box is displayed.
5. Do the following:

   a. In the Negotiation Rate field, enter the rate to apply to the rooms.
   b. (Optional) To apply the rate to a specific type of room, select a room type from the Room Type selection dialog box.
   c. (Optional) To apply the rate to a specific property, select the property in the Property field.
   d. (optional) To apply the rate to all occupancy types for the room, click the Occupancy field.

   The rate is applied to the sleeping rooms and displayed in the Discount Price field of the Room Blocks Line Items list.

Changing the Projected Property for a Subopportunity Quote

In the Aggregate Quote screen, All Quotes view, the sales representative can change the projected property for a subopportunity quote. This can be useful if the customer wants to change one of the events to a different property.

This task is a step in *Process of Creating Recurring Events*.

To change the projected property for a subopportunity quote

1. Navigate to the Aggregate Quote screen, then the Aggregate Quote view.
2. In the Aggregate Quote list, query for and select the required aggregate quote.
3. Click the link in the Name field, and then click the All Quotes view tab.
4. In the All Quotes list, select the required quote.
5. In the Aggregate Quote form menu, choose Change Projected property.

   The Change Property dialog box is displayed with a list of all properties that are related to this Aggregate quote.
6. In the Change Projected Property dialog box, select the property to associate with the quote, and click Select.

   The quote is now associated with the new property.

Submitting an Aggregate Quote for Evaluation

An aggregate quote is automatically submitted to the designated revenue manager for review when the sales representative resets the value in the Status field of the evaluation form.

The status of the quote evaluation changes as the revenue management evaluation progresses through various stages. For more information about the Evaluation statuses, see *Submitting a Quote for Revenue Evaluation*.

When the sales representative changes the status of an aggregate quote, then this change is replicated in all of the subopportunity quotes. The aggregate quote is also displayed in the Evaluations screen at this stage, as are all

subopportunity quotes associated with the aggregate quote. The sales manager can access the evaluation in the Evaluation screen list. After the evaluation is submitted, the evaluation form and the quote cannot be modified by the sales representative.

After the aggregate quote has been submitted, it can be evaluated in the same manner as other quotes. For more information, see *Evaluating the Event Quote*.

This task is a step in *Process of Creating Recurring Events*.

To submit an aggregate quote for evaluation

1. Navigate to the Aggregate Quote screen, then the Aggregate Quote view.
2. In the Aggregate Quote list, query for and select the required aggregate quote.
3. Click the link in the Name field, and then click the Evaluation view tab.
4. In the Aggregate Quote Evaluation form, set the value in the Evaluation Status field to Submitted.

18 Managing Property-Specific Event Quotes

Managing Property-Specific Event Quotes

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

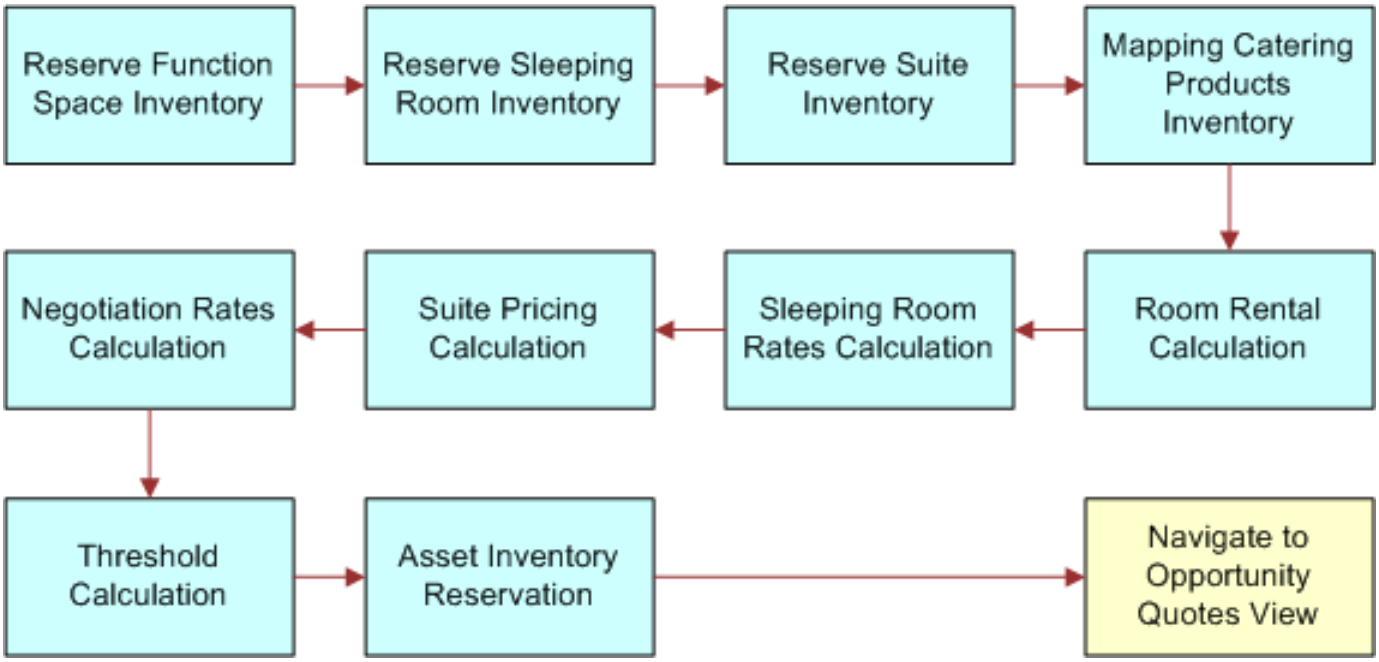
- *About Property-Specific Quotes*
- *Scenario for Managing Property-Specific Event Quotes*
- *Roadmap for Managing Property-Specific Event Quotes*
- *Generating an Event Quote*
- *Generating Quotes from Opportunities*
- *Generating Quotes from Recurring Events*
- *Generating Quotes from Host-Affiliate Opportunities*
- *Modifying an Event Quote*
- *Changing the Sales Manager and Event Manager for a Quote*
- *Changing Multiple Event Quotes*
- *Applying a Property-Specific Event Template to a Quote*
- *Creating an Event Template from a Quote*
- *Adding Details to an Event Quote*
- *Managing Functions Associated with Quotes*
- *Adding Nonfunction Line Items to a Quote*
- *Managing Event Room Block Information in Quotes*
- *About Time Shifts for Function Spaces and Sleeping Room Blocks*
- *Process of Reviewing Quote Details*
- *Scenarios for Calculating Taxes, Service Charges, and Revenues*
- *Reviewing Quote Discounts*
- *Reviewing Revenue Estimates for Quote Functions*
- *Reviewing Macro Estimates for Quotes*
- *Viewing the Quote Event Calendar*
- *Analyzing Quotes, Functions, and Room Blocks with Charts*
- *Process of Managing Meeting Packages in a Quote*
- *About Core and Noncore Field Behaviors in Quotes*
- *Workflow for Copy Function Line Items Functionality*

About Property-Specific Quotes

After the event sales representative generates a quote for each property, the opportunity phase of event planning ends, and the quote phase begins.

The opportunity is used to capture customer information about the event that might be applicable to a number of properties. From the customer information, quotes are generated, and the generic information is transformed to property-specific information. Quotes incorporate the availability and pricing response from each property, given the generic requirements captured during the opportunity stage.

Creating a property quote from the Opportunity screen, Properties view starts several system processes. The following image shows an example of a typical process flow.



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

- Opportunity information is transferred to the quote. This includes notes, billing information and macro estimates.
- The generic products detailed in the opportunity are mapped to property-specific products, if the product mapping has been defined. For more information about product mapping, see *Mapping Property-Specific Products to a Generic Catering Product*.
- Room block information, room blocks, and line items from the opportunity are transferred to the Quote screen, Room Block views. In addition, the property availability check is started to determine the availability of specified rooms. As part of this process, generic sleeping rooms are mapped to specific sleeping room types. A best-fit algorithm is also applied for function space availability. This algorithm translates the generic requirements for functions and maps them to property-specific function spaces.

> **Note:** If the Bypass flag has been set for any of the properties, Siebel Hospitality skips the function space availability check and the sleeping room availability check.

- After the availability check is completed, the pricing process occurs.
- An asset inventory check for critical catering products is performed.

Quotes and the Best Fit Process

When you generate a quote, several process are started as shown in the image in *About Property-Specific Quotes*. One part of the reservation of function space inventory is the best fit process. The best fit process attempts to match a function space at the property with the most suitable function space by taking into account the size of the function room required, the amount of people attending, and the product features associated with the function space. If a function space is not found by the best fit process, then it is possible to simply associate a function with a function space manually.

Quotes and Nonparticipating Properties

For nonparticipating properties, generic products (line items and room blocks) are not mapped to property-specific products. Instead, the generic agenda is replicated in the quote line items view.

Pricing information is not associated with room blocks, and the availability check for both room blocks and function space is not performed. Also, the critical asset inventory check is not performed.

> **Note:** It is recommended that you create one sleeping room for NPPs, and map this sleeping room to a generic sleeping room. This is so that when the quote is generated, a line item from the opportunity can be mapped to the sleeping room at the NPP. For more information, see *Setting Up Nonparticipating Properties*.

When a quote is generated for a non-participating property, the NSO, EBC, or whoever creates the quote must provide details to the NPP about the opportunity, and must then request pricing and availability information.

For more information about nonparticipating properties, see *Managing Nonparticipating Properties*

Quotes and Property Dates

To generate quotes for specific associated properties, an opportunity record must have an arrival date and a departure date. In addition, you can specify one or more sets of arrival and departure dates for each property associated with an opportunity. These dates can be different from the opportunity dates. When you generate quotes for the opportunity, Siebel Hospitality performs the following actions:

- For each property that does not have its own arrival and departure dates, Siebel Hospitality generates one quote that uses the opportunity dates.
- For each property that has one arrival date and one departure date of its own, Siebel Hospitality generates one quote that uses the property dates.
- For each property that has multiple arrival and departure dates of its own, Siebel Hospitality generates one quote for each set of property dates.

Asynchronous Generation of Multiple Quotes

Siebel Hospitality allows asynchronous generation of multiple quotes. Sales representatives must be aware of the following facts regarding asynchronous generation of quotes:

- In the Opportunity Capture view or the Opportunity Properties view, the sales representative can select multiple records in the Properties list and click the Create Quote button. This creates one or more quotes for each of the selected properties, depending on how many sets of arrival and departure dates are associated with each selected property.
- When generating Affiliate Quotes for a number of Affiliate Opportunities associated with a Host Opportunity, the sales representative can select multiple records in the Affiliate Opportunities list and click Create Quote. This creates one quote for every property associated with every selected affiliate opportunity.
- When generating subopportunity quotes for a number of subopportunities associated with a recurring opportunity, the sales representative can select multiple records in the Sub Opportunities list and click Create Quote. This creates a quote for every property associated with every selected subopportunity.
- If the sales representative does not have permission to generate quotes for some of the selected properties (that is, the user is unable to view those properties in the Properties Screen), then those properties are not included in the Create Quote operation.
- If there are already existing quotes for the same opportunity for some of the selected properties, and the existing quotes have the Do Not Override flag checked, then those properties are included in the Create Quote operation.
- If the projected property (primary property) for the opportunity was one of the properties selected for quote creation, then the projected property quote is always the first one generated.
- When the Create Quote button is clicked, one quote is created immediately and the user is taken to the corresponding Opportunity Quotes view, where the newly generated quote is visible. It has a status of Prospect if the Create Quote operation succeeded, or a status of Error if an application error occurred. Ask the system administrator to review the Siebel application log to find the cause of such errors.
- The user can requery the Opportunity Quotes list to see the progress of quotes being generated in the background. If a quote's status is Generating, it is still in the process of being created.

The following points illustrate the effect that asynchronous generation of quotes has on system administration:

- The asynchronous generation of quotes (that is, the second and subsequent quotes in a multiple selection) is handled by a separate component of Oracle's Siebel Server. This component is called Hospitality Quote Generation (HospitalityQuoteGen). This component and the object manager server component Hospitality Object Manager (eHospitalityObjMgr) are both part of the Hospitality component group.
- Usually, the server component HospitalityQuoteGen is enabled and running on the same application server as the eHospitalityObjMgr. However, it is possible for this component to be placed on a separate Siebel application server.
- The setting for the expected number of HospitalityQuoteGen threads running simultaneously on a given server can be determined by dividing the estimated total number of quotes generated per hour by 180, then dividing again by the number of Siebel application servers over which this load is distributed, and rounding up. (This formula assumes that quotes take approximately 20 seconds to generate.) This figure can be used to set the MaxMTTasks parameter of the server component.
- If a quote is created in the background and has a status of Error, the cause can be found in the log file HospitalityQuoteGen_<PID>.log in the Siebel log file directory. Sometimes it is necessary to increase server component event logging levels in order to determine the cause of such an error.

- The system administrator can turn off background generation of quotes by going to the Administration - Application screen, System Preferences view, and adding a new System Preference named Background Quote Generation with a value of N. This generates all the quotes in a multiple selection synchronously. The user interface is not changed to display the Opportunity Quotes view until all the quotes have finished being generated. If many quotes are being generated at once, the application might take some time to respond.

Scenario for Managing Property-Specific Event Quotes

This topic gives one example of how property-specific event quotes might be used. You might use property-specific event quotes differently, depending on your business model.

After capturing opportunity information for a customer, an event sales representative generates quotes for each selected property so that the availability and pricing information for each property can be presented to the customer. In some cases, either the function space or the room blocks are not available for the selected property. The sales representative tries to find other accommodations within the property.

If the customer does not like the projected price, the sales representative can search for room block alternatives, or offer a discount to the customer.

During this process, the sales representative also reviews the average value of each property, performs revenue rollups by parent category and category, and checks the summary for each of the properties.

Roadmap for Managing Property-Specific Event Quotes

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

> **Note:** Before performing the procedures and processes listed in this roadmap, complete the procedures in *Capturing Hospitality Opportunities*.

To manage property-specific event quotes, perform the following tasks and processes:

1. *Generating an Event Quote*
2. *Generating Quotes from Opportunities*
3. *Generating Quotes from Recurring Events*
4. *Generating Quotes from Host-Affiliate Opportunities*
5. *Modifying an Event Quote*
6. *Changing the Sales Manager and Event Manager for a Quote*
7. *Changing Multiple Event Quotes*
8. *Applying a Property-Specific Event Template to a Quote*
9. *Creating an Event Template from a Quote*
10. *Adding Details to an Event Quote*
11. *Managing Functions Associated with Quotes*
12. *Adding Nonfunction Line Items to a Quote*
13. *Managing Event Room Block Information in Quotes*
14. *Process of Reviewing Quote Details*
15. *Reviewing Quote Discounts*
16. *Reviewing Revenue Estimates for Quote Functions*

17. *Reviewing Macro Estimates for Quotes*
18. *Viewing the Quote Event Calendar*
19. *Analyzing Quotes, Functions, and Room Blocks with Charts*
20. *Process of Managing Meeting Packages in a Quote*

Generating an Event Quote

There are a number of different types of quotes that can be created in Siebel Hospitality. Quotes can be generated for ordinary opportunities, for recurring events, and for host-affiliate opportunities. Because the opportunities are created in different ways using different views, the generate quote process is different for each of these opportunity types.

This topic contains the following topics and is a step in *Roadmap for Managing Property-Specific Event Quotes*:

- *Generating Quotes from Opportunities*
- *Generating Quotes from Recurring Events*
- *Generating Quotes from Host-Affiliate Opportunities*

Generating Quotes from Opportunities

Property-specific quotes can be generated from ordinary opportunities. Perform the following procedure to generate a property-specific quote.

If you generate quotes that are associated with multiple properties, you can select the Change Projected Properties menu item on the Opportunities screen and then select a property to see the revenue that is associated with that property in the Revenue field of the Opportunities screen.

This task is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To generate a quote from an opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Properties view tab, and in the Properties list, create a new record.
5. In the Add Properties dialog box select the property, and then click OK.

   The property appears selected in the Properties list.
6. (Optional) Select additional properties.
7. (Optional) To omit availability checks, in the Properties list, click Bypass.
8. Click Create Quote.

   One or more quotes are created, depending on the following factors:
   - How many sets of arrival and departure dates are associated with each property. For more information about the relationship between quotes and property dates, see *Quotes and Property Dates*.
   - Whether Siebel Hospitality is configured to generate quotes for the selected properties (the default) or for all properties. For information about controlling the relationship between quote generation and property selection, see *Generating Quotes for All Opportunity Properties*.

If you create multiple quotes, the quotes for the primary property are created first, and then all other quotes are created.

The Opportunity Quotes view appears.

Generating Quotes from Recurring Events

Quotes cannot be generated from parent recurring opportunities, because a sales representative must be able to generate quotes, orders, and event checks for each individual event at the time the event occurs, and there might be time gaps between events in a recurring opportunity. Quotes can be generated, however, for individual events in a series of recurring events from the Sub Opportunities view.

For more information about generating quotes from recurring events, see *Managing Recurring Events*.

This task is a step in *Roadmap for Managing Property-Specific Event Quotes*.

Generating Quotes from Host-Affiliate Opportunities

When a host opportunity has been defined, that is, room block, functions, affiliate opportunities, and so on, it is possible to generate a quote for the host opportunity. When the quote information have been reviewed, the host can confirm that the quote is definite. When the host quote becomes definite, it is then possible for affiliates to call and confirm that they are affiliated with the quote. At this stage, affiliate quotes can be generated from the affiliate opportunities.

This topic contains the following topics and is a step in *Roadmap for Managing Property-Specific Event Quotes*.

- *Generating Host Quotes*
- *Generating Affiliate Quotes*

Generating Host Quotes

Host quotes are generated in the same manner as ordinary quotes. You must generate a quote for the primary property associated with a host quote. For more information about generating quotes from host opportunities, see *Generating Quotes from Opportunities*.

> **Note:** When you generate a quote from a host opportunity, the affiliate information associated with the opportunity is also transferred to the quote.

This task is a step in *Generating Quotes from Host-Affiliate Opportunities*.

Generating Affiliate Quotes

Affiliate quotes can only be generated after the Sales Status of the host quote is set to Definite. At this stage, affiliates can confirm that they are associated with the opportunity.

This task is a step in *Generating Quotes from Host-Affiliate Opportunities*.

To generate an affiliate quote

1. Define the required host quote as described in *Roadmap for Managing Property-Specific Event Quotes*.
2. Review the quote details with the host company, and make sure the host company is satisfied with this quote.
3. Navigate to the Quotes view tab for the host opportunity.
4. In the quote record, set the Sales Status field to Definite.
    - If the Quote Sales Status Model is enabled, and the Threshold Profit Variance is less than or equal to zero, you cannot change the Sales Status to Definite until you have changed the Evaluation Status of the quote to Approved.

      To set the Evaluation Status to Approved, navigate to the Evaluations view tab of the host opportunity, and change the status to Approved.
    - If the Quote Sales Status Model is enabled and the Thresholds Profit Variance is greater than zero, or if the Quote Sales Status Model is not enabled, you can upgrade the quote status to Definite without changing the Evaluation Status to Approved.
5. Click the Affiliate Opportunities view tab.
6. Select the required opportunity (or opportunities), and click Create Quote.

   The quote or quotes is created, and the Affiliated Opportunities screen, Quotes view is displayed, showing the property and quote associated with the subopportunity.

Modifying an Event Quote

After a quote is created, the sales representative can update certain quote information such as the quote name or sales status from the Opportunity Quotes view.

> **CAUTION:** When modifying a quote, make sure that you are on the sales team that is associated with the quote. In other words, make sure your name is on the list in the Sales Team field of the quote record. Not doing so can lead to unpredictable and undesired results.

For example, suppose you select an opportunity with an associated sales team that does not include you. The selected opportunity has an associated room block, which in turn has room block line items. If you change the Arrival Date of the opportunity, you cannot access the functionality for selecting Update Dates or Update Day Numbers to specify how to apply the change to associated records. Consequently, the change to the Arrival Date is not propagated to the Date fields on the room block line items.

This task is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To modify an event quote

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the opportunity record, click the link in the Opportunity Name field.
4. Navigate to the view or subview appropriate to the modification you want to make:
    - To modify the opportunity quotes, click the Quotes view tab.

- To modify subopportunity quotes, click the Sub Opportunities view tab, and then click the Sub Opportunity Quotes link.
- To modify affiliate quotes, click the Affiliate Opportunities view tab, and then click the Quotes link.

5. In the Quotes list, select the quote and revise the quote information as required.

The following table describes some of the fields in the quote record.

Field	Comments
Quote Name	The quote name. This field is automatically populated with the name of the opportunity but can be changed if required. Click the Quote Name link to navigate to the Quote screen, Functions view.
Quote #	System-generated unique value. Click the Quote # link to navigate to the Quote Room Blocks view, where room block items can be added and item attributes defined.
Total	Total estimated revenue (rollup).
Property	The property associated with the quote.
Sales Status	When a quote is generated, the default sales status is Prospect. This value can be changed to Hold, Customer Approved, Adjusted, T1, T2, and so on to reflect the actual sales status of the event opportunity.
Arrival Date	The start date for the event at the property.
Departure Date	The end date for the event at the property.
# of Nights	Calculated from values in the Arrival Date and Departure Date fields.
Do Not Override	When selected (default), indicates that the quote is not subject to an override action.
Post as Name	The name by which the event is posted.
Decision Date	The date by which the customer must make a decision. The value in this field is copied from the opportunity, but can be changed.

Changing the Sales Manager and Event Manager for a Quote

When a quote is generated from an opportunity, the Sales Manager and Event Manager information for the opportunity is transferred to the quote. However, if necessary, the sales representative can change the Event Manager and Sales Manager. If the sales representative decides to do this, then the following rules are applied to the change:

- If the sales representative picks a Sales Manager or Event Manager who is not yet on the quote team, then that person is automatically added to the team.
- If the sales representative decides to remove a person from the team that also happens to be the Sales Manager or Event Manager for the quote, then the sales representative is warned that the person whom they are trying to remove has been designated as the Sales Manager or Event Manager.
- If the sales representative removes someone from the Sales Manager or Event Manager field, then the sales representative is given the option to also remove that person from the quote team.

This task is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To change the sales manager or event manager for a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote.
3. Click the link in the Name field, and click the Show More button.
4. In the Quote form, scroll down to the Manager Information section of the form, and do one of the following as required:
    - Click the single select button in the Sales Manager field.
    - Click the single select button in the Event Manager field.
5. In the Pick Employee selection dialog box, select the new Sales Manager or Event Manager for the quote, and then click OK.

    If there is a person already designated as the Sales Manager or Event Manager for the quote, then a dialog box is displayed asking if you want to remove the existing person from the team.
6. Do one of the following:
    - To replace the existing manager and also remove that person from the Quote team, click OK.
    - To replace the existing manager but retain that person as part of the team, click Cancel.

Changing Multiple Event Quotes

Changes can be made across all the event quotes associated with a specific opportunity. The user performs this task by updating the opportunity record and overriding all the quotes associated with the opportunity.

If a particular quote must not be overridden, the Do Not Override flag is set for the opportunity quote record. Selecting the check box flag indicates the quote is to be ignored and not be overridden by the new quote created from the opportunity.

This task is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To change multiple event quotes

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, query for and select the opportunity.
3. In the Opportunity record, click the link in the Opportunity Name field.
4. Click the Function Agenda view tab, select the Function Agenda record, and make any necessary updates to the record.
5. Scroll down to the Agenda Line Items list, and make any necessary updates to the records.
6. Click the Room Blocks view tab, select the Room Block record, and make any necessary updates to the record.
7. Scroll down to the Room Block Line Items list, and make any necessary updates to the records.
8. Click the Quotes view tab.
9. In the Quotes list, deselect the Do Not Override check box for each record that can be overwritten.
10. Click the Properties view tab and in the Properties list, select the property record, and then click Create Quote.

Applying a Property-Specific Event Template to a Quote

When a quote has been created, you can apply a property-specific event template or the format of an existing quote to the new quote to define standard information about that quote. For example, there might be an event template for a wedding at the Grand Hotel, where a number of standard functions and room blocks are used for the wedding. The sales representative might then apply this template, which applies the specific details for a wedding at the property to the quote.

When you apply an event template to a quote, you overwrite the existing information in the quote with information contained in the event template. For information about creating an event template, see *Defining Event Templates*.

You *cannot* apply an event template to a quote under the following circumstances:

- The quote includes functions that are associated with an order.
- The quote has a meeting package attached to it.

This topic is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To apply a property-specific event template to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. Click the menu button, and select Apply Event Template.
4. In the Pick Event Template/Quote dialog box, complete the fields, and then click OK.

   The following table describes some of the fields.

Field	Comments
Template/Quote	Provides a list of all property-specific event templates and existing quotes that can be applied as a template to the new quote.
Arrival Date	Select an arrival date for the event.
Header	If you select this check box, the information contained in the More Info form and the Room Block Info form of the new quote is overwritten by the information contained in the template.
Functions	If you select this check box, all functions in the template are copied to the new quote.
Sub Functions	If you select this check box, all subfunctions in the template are copied to the new quote.
Line Items	If you select this check box, all line items for functions and subfunctions in the template are copied to the new quote.
Room Blocks	If you select this check box, all sleeping room blocks in the template are copied to the new quote.
Room Block Line Items	If you select this check box, all sleeping room block line items in the template are copied to the new quote.
Non-Function Line Items	If you select this check box, all nonfunction line items in the template are copied to the new quote.

Creating an Event Template from a Quote

If the information defined in a quote could be useful when creating future event quotes, you can create a template from the existing quote. The components of the quote, including functions, function line items, nonfunction line items, room blocks, and room block line items, are carried over to the event template.

This topic is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To create an event template from a quote

1. Navigate to the Quotes screen, then the List view.

2. In the Quotes list, query for and select the quote.
3. Click the menu button, and select Create Specific Template.

   The template is created in the Property Specific list in the Event Templates screen.

Adding Details to an Event Quote

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

This topic contains the following topics and is a step in *Roadmap for Managing Property-Specific Event Quotes*:

- *Modifying the Event Quote Arrival Date*
- *Adding Notes to a Quote*
- *Adding Activities to a Quote*
- *Adding Attachments to a Quote*
- *Verifying and Updating Billing Information for a Quote*
- *Entering and Tracking Booking Fee Information for a Quote*
- *Entering Credit Check Information for an Event Quote*

These tasks are steps in *Roadmap for Managing Property-Specific Event Quotes*.

Modifying the Event Quote Arrival Date

If necessary, you can change the arrival and departure date information for an event quote, or delete the arrival date. When you change the arrival date for an event quote, you can control how the dates of associated functions and room blocks change.

This task is a step in *Adding Details to an Event Quote*.

Changing the Event Quote Arrival Date

To change the arrival date for an event quote, follow this procedure.

To change the event quote arrival date

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for a quote whose arrival date you want to change.
3. Proceed either to Step 4 or Step 5 as required:
   - Go to Step 4 if you want to automatically shift the dates of associated functions and room blocks by the same number of days as the quote arrival date.
   - Go to Step 5 if you want to control how the arrival dates of associated functions and room blocks are shifted.
4. To shift function and room block dates the same as the quote, perform the following steps.
   a. In the Arrival Date field, select a new date.

Siebel Hospitality shifts the dates for the associated functions and room blocks by the same number of days as the new arrival date you entered for the quote. The day estimates under the Macro Estimates view also change according to the change to the function dates.

If meeting packages are applied to the quote, then the following additional actions occur:

- The dates of nonfunction line items are also shifted.
- If the new arrival date does not fall within the meeting package date ranges, then an error is generated. Otherwise, all the dates are shifted.

> **Note:** If no meeting packages are applied to the quote, then the default behavior can be changed through the Shift Functions and Shift RoomBlocks business component user properties. However, if meeting packages are applied to the quote, then only the dates are shifted regardless of the settings of the user properties.

b. Go to Step 6.

5. To control the function and room block date shifts, perform the following steps.

a. Do one of the following:

- Click Modify Arrival Date.
- Click Menu and choose Modify Arrival Date.

The Enter/Change Arrival Date dialog box appears.

b. In the Enter/Change Arrival Date dialog box, complete the fields.

Some fields are described in the table that follows.

Option	Comments
Arrival Date	Enter a new arrival date for the quote.
Shift Functions	Indicates whether to shift function dates according to the change to the arrival date of the quote. If meeting packages are applied to the quote, then this check box is disabled. The function dates are shifted automatically.
Shift Room Blocks	Indicates whether to shift room block dates according to the change to the arrival date of the quote. If meeting packages are applied to the quote, then this check box is disabled. The room block dates are shifted automatically.

The values for each check box indicate the following actions:

- When selected (default), shifts the dates of associated items to the same date as the new arrival date for the quote.

- When cleared, retains the original dates of associated items. Changes the values in the Day Number fields of the items to reflect the new relationship between the quote arrival date and the item dates.

> **Note:** The Day Number field value is the day number in relation to the arrival date, where the arrival date is equal to a value of 1. For example, if you change the arrival date of a quote from June 4 to June 2, but retain June 4 as the date for associated items, the Day Number field values of the items change from 1 to 3.

c. Click OK to confirm the arrival date changes and close the dialog box.

   If meeting packages are applied to the quote and the new arrival date does not fall within the meeting package date ranges, then an error is generated. Otherwise, all the dates are shifted.

6. To verify the changes to functions and room blocks, perform the following steps.

   a. Click the link in the Name field of the current quote.
   b. Click the Functions view tab.

      In the Functions list, check the values in the Day # and Date fields.
   c. Click the Non-Function Line Items view tab.

      In the Non-Function Line Items list, check the values in the Day # and Date fields.

      If meeting packages are applied to the quote, then the nonfunction line item dates are shifted. If no meeting packages are applied to the quote, then the nonfunction line item dates are not shifted.
   d. Click the Room Blocks view tab.

      In the Room Block Line Items list, check the values in the Day # and Date fields.

Deleting the Event Quote Arrival Date

To delete the arrival date for an event quote, follow this procedure.

> **Note:** If meeting packages are applied to the quote, then you cannot delete the arrival date of the quote.

To delete the event quote arrival date

1. In the Quotes list, query for an opportunity whose arrival date you want to remove.
2. Delete the date in the Arrival Date field.

   The dates of the associated functions and room blocks are also deleted, but the relative day numbers stay the same. For example, the arrival date for an quote is 1/1/11 and an associated function day number is 3, which is 1/3/11. If you delete the arrival date from the quote record, the 1/3/11 date is deleted from the function record, but the function remains scheduled for day 3.

   The arrival dates of associated subopportunities, the dates of associated subopportunity functions, and the dates of associated subopportunity room blocks are not deleted.

Adding Notes to a Quote

The sales user can attach property-specific notes to the quote using the Quote screen, Notes view. Notes can be designated as private, only accessible by the creator, or public, accessible by the entire events planning team.

This task is a step in *Adding Details to an Event Quote*.

To add notes to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Notes view tab, and choose Public Notes or Private Notes from the visibility filter.
5. In the Notes list, add a record, and then add the note text in the Description field.
6. Save the note.

Adding Activities to a Quote

The sales user can create activities for the quote. For example, if a customer requests a special menu, the sales user can create an activity to ask the event manager to verify whether or not the property can accommodate the request.

This task is a step in *Adding Details to an Event Quote*.

To add activities to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Activities view tab.
5. In the Activities list, create a record, and complete the fields.
6. Set the priority and status to flag activities that must have immediate attention.
7. Save the activity.

Adding Attachments to a Quote

A sales representative can use the Attachments view to attach relevant document and other media to the quote during the quoting phase. Attachments can include relevant documents, files or images that can be of use when supplying a quote to the customer. For example, a customer might want to view a brochure for a standard event, such as a wedding.

This task is a step in *Adding Details to an Event Quote*.

To add attachments to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Attachments view tab.

5. In the Attachments list, click either New File or New URL.
6. Associate the file, and then save the record.

Verifying and Updating Billing Information for a Quote

The billing information captured for the opportunity is automatically transferred to the quote record. Sales users can verify and update the billing information using the Billing view. This includes information about the contact or account to be billed, any deposit for the quote, tax exemption details, and payment information.

This task is a step in *Adding Details to an Event Quote*.

To verify and update billing information for a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Billing view tab.

   The Billing form shows the quote billing information.
5. Make necessary changes to the billing information, and then save the record.

Entering and Tracking Booking Fee Information for a Quote

Each sales representative might be responsible for bookings for a region or a cluster of hotels. The representative can still book and refer customers to hotels outside of the representative's immediate area of responsibility. Hospitality properties outside the representative's region usually pay an agreed booking fee for the business.

Using the Fees view, the representative and event manager can enter the expected booking fees and then return to the view and complete the rest of the fields when the fees are collected.

This task is a step in *Adding Details to an Event Quote*.

To enter and track booking fee information for a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote.
3. In the Quote record, click the link in the Name field.
4. Click the Fees view tab.
5. In the Booking Fees form, complete the fields.

   The following table describes some of the fields.

Field	Comments
Booking Fee Eligible	When selected, this check box indicates that the quote is eligible for booking fees.
Fee Eligible By	Automatically populated with the User ID of the sales user who determines the quote to be eligible for a booking fee.

Field	Comments
Booking Fee Amount	The amount of the booking fee that is due.
Eligible Date	The date the user sets the booking fee eligibility.
Booking Fee Accepted	The check box indicates that the booking fee information has been verified.
Fee Accepted By	The ID of the representative who accepts the eligibility claim.
Accepted Date	Automatically populated when the hotel representative indicates acceptance of the eligibility claim.
Booking Fee Collected	When selected, this flag indicates that the booking fee has been collected.
Collected Amount	The amount of the booking fee that is collected.
Collected By	The User ID of the sales representative who collects the booking fee.
Collected Date	The date the booking fee is collected.

Entering Credit Check Information for an Event Quote

The Credit Request view allows the sales representative and event manager to determine the credit status and log credit information for an event group that requests credit for event costs.

This task is a step in *Adding Details to an Event Quote*.

To enter credit check information for an event quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Name field.
4. Click the Credit Requests view tab.
5. In the Credit Requests list, add a record, complete the fields, and save the record.

   The following table describes some of the fields.

Field	Comments
Request Type	Check or Reserve. Check allows the user to precheck the credit of the group to determine the credit rating before the arrival of the group. Only Hold, T1, and T2 groups are eligible for the Check request type. A Reserve Request Type is required for a group with a Definite status.
Credit Requested Date	Shows the date of the credit request.
Account to Charge	Primary or Intermediary. An intermediary account is related to the primary account, and the relationship is established during Opportunity creation.
Request Status	Options are Pending, Recommend, Warn, Deny, and Cancel.
Credit Request Amount	The amount of credit that is requested.
Direct Bill Application Approved	The status of the credit application received by accounting. This check box indicates to the sales representative and event manager whether or not an alternate method of payment is required.
Direct Bill Application Received	This field is used by hospitality properties that are not connected to a credit system. When selected, the check box indicates to the sales representative and event manager that the customer has completed the direct bill application.
Credit Requested By	Automatically populated with the User ID of the individual who submits the request for credit approval using a credit system.

Note: This credit check functionality is for information purposes only. In order for the credit check to work, an integration with a credit system must be built that accommodates the practices set by the individual hotel or the accounting department for the individual properties.

Managing Functions Associated with Quotes

When the sales user clicks Generate Quote, function records are automatically created with fields populated and hierarchical relationships defined if the function has been defined at the opportunity stage.

However, for nonparticipating properties, only the generic agenda is replicated and appears in the Quote screen, Function Line Items view. No mapping to property specific function space occurs. For more information about nonparticipating properties, see *Managing Nonparticipating Properties*.

This topic contains the following topics:

- *Adding Functions and Function Line Items to a Quote*
- *Creating a Hierarchy of Quote Functions*
- *Adding Resource Cluster Line Items to a Quote*
- *Validating Functions and Function Line Items for a Quote*
- *Preventing Functions from Being Moved*
- *Changing Function Spaces with Product Features*
- *Managing Quote Functions*
- *Copying Function Line Items to a Different Quote*

This topic is a step in *Roadmap for Managing Property-Specific Event Quotes*.

Adding Functions and Function Line Items to a Quote

The following procedures detail how to add functions and function line items to a quote. You can add functions and line items to quotes for nonparticipating properties as well.

This task is a step in *Managing Functions Associated with Quotes*.

Adding Functions to a Quote

You can associate functions with a quote by following this procedure.

To add a function to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Functions view tab.
5. In the Functions list, add a record and complete the fields, as required.

   Some fields are described in the following table.

Field	Comments
Function Space	This is a multi-value group field. In this field, you can enter details about the function space, such as whether or not it is the primary space, whether or not backup is required, the booking type, the setup style, and the inventory status of the space.
Function Status	This field is automatically populated with a value of Prospect. You can change this value as required to indicate whether or not the function is to go ahead.

   For a description of other function fields, see *Adding a Function Agenda and Line Items to an Event Opportunity*.

Adding Function Line Items to a Quote

You can add line items to a function that is associated with a quote by following this procedure.

> **Note:** To add catering or common products as line items of a function, you must first set up visibility for the product. For more information, see *Process of Adding Catalog Visibility to Hospitality Products*.

To add function line items to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Functions view tab and select the function.
5. Scroll down to the end of the view and click the Line Items subview tab.
6. In the Line Items list, do one of the following:
   - Add a single line item.
   - Add multiple items by clicking Add Items.

     The Add Items button allows you to add different quantities of different products at one time.
7. In the line items you added, complete the fields as required.

   For a description of function line item fields, see *Adding a Function Agenda and Line Items to an Event Opportunity*.

Creating a Hierarchy of Quote Functions

You can build a three-level hierarchy of parent functions, subfunctions, and child subfunctions. To build a hierarchy of quote functions, follow this procedure.

To create a hierarchy of quote functions

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for a quote.
3. In the quote record, click the link in the Name field.
4. In the Functions list, add a function record, and complete the fields.

   Some fields are described in the following table.

Field	Comments
Function Type	Select 24 Hour Hold to make the record a space hold function.
Function Space	Select a function space to associate with the function. Available function spaces for subfunctions are constrained to subdivisions of the parent function space.
Detail	Select to indicate the detailed parent function.

Field	Comments
	Note: For functions for which the Detail check box is not selected, you can define only one hierarchical level, for example, function, then subfunction.

5. Build a hierarchy of function, subfunction, and child subfunction records using the following methods:
    - Click the Move up and Move down buttons to position a function under the detailed function record. Click the Demote one level button once to indent the function under the detailed function and make it a subfunction. Click the Demote one level button twice to indent the function under a subfunction and make it a child subfunction.
    - Select the primary function and click the Sub Function button to build a hierarchy of subfunctions under the detailed function in the Create Agenda Sub Function dialog box. Select a subfunction and click the Sub Function button to add a child subfunction under the current subfunction in the Create Agenda Sub Function dialog box.

For more information about building a hierarchy of subfunctions and child subfunctions under a detailed function, see *Detailing a Function*.

Adding Resource Cluster Line Items to a Quote

If necessary, you can add products from different properties as line items to the quote. These products must be booked and borrowed from properties in the sales representative's property cluster.

Before a sales representative can add resource cluster line items, property clusters must be set up, and properties must be added to these clusters. For more information, see *Process of Setting Up Property Clusters*.

This task is a step in *Managing Functions Associated with Quotes*.

To add resource cluster line items to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Name field.
4. In the Functions list, select the required record.
5. Scroll down to the Line Items list, and create a new record.
6. Click the single select button in the Item field.

   The Pick Line Item selection dialog box is displayed.
7. Click the Show Cluster Products button.

   All line items for properties in the cluster are displayed.
8. Add the required resource cluster line items as required.

Validating Functions and Function Line Items for a Quote

The following procedure details how to validate functions and line items associated with quotes.

This task is a step in *Managing Functions Associated with Quotes*.

To validate functions and function line items for a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Quotes Functions list, select the function, and verify function information.
5. In the Function Line Items list, verify line item information, and perform the following actions if the line item is a menu item:
    a. Specify a value in the Course # field. This action identifies the course associated with this line item when the Banquet Event Order is printed.
    b. If necessary, change values in the Service Start Time and Service End Time fields. The default values are the function start and end times, respectively. If the values are changed, the asset inventory status changes to Not Booked, and asset inventory must be booked again for the specified time.
6. When you have verified function line item information, update the pricing information for nonparticipating properties. To update pricing, enter the value of the line item in the Negotiated Price field for the function line item.

Preventing Functions from Being Moved

When defining functions using the Quotes screen, Functions view, a user can prevent other users from moving the function to an alternative function space by using the Do Not Move flag. The Do Not Move Flag check box is cleared by default, which means that other users can typically move functions as required, subject to time and space availability.

The Do Not Move Flag check box is only enabled if the reserved primary function space is a specific space. If the booking is for a category, the Do Not Move Flag check box is read only. If a user tries to change the Function Space value to a category after the Do Not Move check box has been selected, a message is displayed, asking for confirmation. If the user clicks OK, the Do Not Move Flag check box is cleared and the booking is changed to a category.

> **Note:** The handling of bookings with the Do Not Move flag can vary depending on configuration carried out by the administrator. See *Configuring the Do Not Move Flag* for more information.

In the diary views, bookings that cannot be moved because of this flag are indicated with a padlock icon. Using query assistant, a search can be performed to locate bookings with the Do Not Move flag.

This topic is a step in *Managing Functions Associated with Quotes*.

To prevent functions from being moved

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote record.
3. In the quote record, click the link in the Name field.

4. In the Functions list, add a record and complete the fields.
5. Scroll down, click the Function Space tab, and then add a new function space record.
6. In the function space record, complete the fields, making sure that you select the Primary check box and choose a specific function space in the Function Space field.
7. Click Reserve to reserve the inventory.

   The Inventory status must be set to Reserved; otherwise, you cannot complete the next step, because the Do Not Move Flag check box is unavailable.
8. Scroll back up to the Functions list, and select the Do Not Move Flag check box.

Changing Function Spaces with Product Features

If product features are specified as part of the function agenda in the opportunity, these features are copied to the functions when a quote is created. They are visible in the Quotes Functions view.

If you then attempt to change the function space selected by the create quote best fit process to a space that does not contain the requested features, an error message appears. The new choice for function space is accepted only if it can also support the specified product feature.

This topic is a step in *Managing Functions Associated with Quotes*.

Managing Quote Functions

After the quotes are created, and the sales representative has reviewed the booking status from the Quotes screen, Functions view, the user can perform detailed asset inventory bookings from the Functions screen, Line Items view. The Function Space field in this view becomes a multi-value group field.

For example, the user can check the details of assets that are associated with the product using the Functions screen, Line Items Assets view. In addition, users can book noncritical products as well as critical products and double-book a particular asset using this view. For more information, see *Booking Hospitality Assets*.

Note: When critical products are selected, the asset inventory booking mechanism is automatically started.

A visual representation of the inventory bookings is available in the Function Line Items Availability view and the Category Availability view.

This topic is a step in *Managing Functions Associated with Quotes*.

Copying Function Line Items to a Different Quote

It is common for events to include similar functions with comparable requirements. This is especially true for events held for the same customer. For example, a corporate customer holds an executive board meeting function. That function requires a projector, a television, and basic office supplies. It is likely that other executive board meetings will require the same items. In Siebel Hospitality, these requirements are recorded as function line items associated with the quote.

You can copy one line item or multiple line items from a function to another function, or to multiple other functions. These other functions can be associated with the same quote as the source function, or with any quote for the same property.

This topic is a step in *Managing Functions Associated with Quotes*.

To copy function line items to a different quote

1. Navigate to the Quotes screen, then the List view.
2. Identify a quote in which to copy function line items, and click the link in the Quote Name field.
3. In the Functions list, select a function from which to copy line items.
4. In the Line Items list, select one or more line items to copy to another function.
5. Click Copy Line Items.

   The Pick Functions dialog box displays other functions and subfunctions that are associated with the current quote. For more information about restrictions on the displayed functions, see *Conditions for Copying Function Line Items*.
6. (Optional) To select a function of a different quote associated with the current property, perform the following steps.

   a. In the Pick Functions dialog box, click Query All Quotes.
   b. Query for the functions associated with a different quote.

   The Pick Functions dialog box displays the functions associated with the quote returned by the query.
7. In the Pick Functions dialog box, select one or more functions to which to copy the selected line items, and click OK.

   Siebel Hospitality copies the selected line items from the current function to the functions you selected, and redisplays the Functions view.

   > **Note:** Function space records are not copied even if you select them. Also, if you select a child product but not its parent, the child product is not copied. However, if you select the parent record, all the child products of that parent are copied.
8. Navigate to the target functions and, if necessary, update the fields in the copied line items.

   For more information about function line item fields that are not copied, see *Conditions for Copying Function Line Items*.

Conditions for Copying Function Line Items

To be displayed for selection in the Pick Function(s) dialog box, the functions returned must meet the following conditions:

- **Property**. The parent property is the property associated with the quote from which the copy function was called.

  If you click Query All Quotes in the Pick Functions dialog box, this condition does not apply.
- **Quote status**. The parent quote status is other than Lost/Turndown, Cancel, or Actual.
- **Function status**. The function status is other than Lost/Turndown, Cancel, or Actual.

If you copy line items to a function in the same quote, the line item fields whose values are *not* copied are listed in the following table. You might have to update these fields manually in the new line items of the target functions.

Field	Comments
Start Time	Default value is the Start Time of the function to which the line items have been copied.
End Time	Default value is the End Time of the function to which the line items have been copied.
List Price	Price of the line item, as specified in the Property Administration screen, Event Order/Menu Items view, Price subview.
Inventory Status	Asset inventory status. When the line item is an asset, this field denotes conditions such as whether or not that asset has been booked. For example, if an asset that is being copied is a critical item, Siebel Hospitality automatically tries to reserve the asset after copying it to the new function. If the booking is unsuccessful, this field displays a value of Re-rented. As another example, if the booking of a noncritical line item is unsuccessful, this field displays a value of Unavailable.

If you copy line items to a function in a different quote, the line item fields whose values are *not* copied are listed in the following table. You might have to update these fields manually in the new line items of the target functions.

Field	Comments
Start Time	Default value is the Start Time of the function to which the line items have been copied.
End Time	Default value is the End Time of the function to which the line items have been copied.
List Price	Price of the line item, as specified in the Property Administration screen, Event Order/Menu Items view, Price subview.
Negotiated Price	Empty (null).
Discount %	Any existing discounts are removed.
Discount Amount	Any existing discounts are removed.
Inventory Status	Asset inventory status. When the line item is an asset, this field denotes conditions such as whether or not that asset has been booked. For example, if an asset that is being copied is a critical item, Siebel Hospitality automatically tries to reserve the asset after copying it to the new function. If the booking is unsuccessful, this field displays a value of Re-rented. As another example, if the booking of a noncritical line item is unsuccessful, this field displays a value of Unavailable.

The line item fields that are copied and not copied can be modified through configuration.

Additional validations are as follows:

- **Critical items**. Critical items are automatically booked. If booking is unsuccessful, the item is double-booked or re-rented.

- **Associated orders**. If the function to which the line items are copied has an associated order, all copied line items are also associated with that order. In other words, the function items in the quote and the order are synchronized.
- **Menus and packages**. If the copied line item is a menu or package, all child items are also copied.

Adding Nonfunction Line Items to a Quote

A *nonfunction line item* is an item that is not used in or part of any specific function. Typically, nonfunction line items are perks given to a customer. Examples are free wi-fi, gift certificates, golf credits, and spa credits. To add nonfunction line items to a quote, follow this procedure.

This topic is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To add nonfunction line items to a quote

1. Navigate to the Quotes screen, then the List view.
2. Find a quote and click the link in the Name field.
3. Click the Non Function Line Items view tab.
4. In the Non Function Line Items list, create a new record and complete the fields, as required.

   Some fields are described in the following table.

Field	Comments
Item	Select a product to associate with this nonfunction line item. The list of available selections is constrained to the products that are available for the current property, and items that are not associated with any property.
UoM	Unit of measure for the item.
Qty	Quantity of items.
Revenue Sub Category	Revenue subcategory with which this item is associated. Populated from the associated product record.

5. Click Reprice All to recalculate the nonfunction line item prices.

   For more information about repricing, see *Reprice All Button*.

Managing Event Room Block Information in Quotes

When a quote is generated for an opportunity, the followings activities occur:

- Sleeping room availability for the room block is checked.
- Sleeping room pricing is started, which generates the pricing information for all sleeping rooms.
- Room blocks and room block line items are mapped to property-specific rooms and line items.

  For more information about these processes, see *Defining Sleeping Room Inventory Controls*.

Alternatively, when a quote is generated from a nonparticipating property, sleeping room availability and pricing are not performed, and the generic room block information is simply replicated for the quote. For more information about NPPs and sleeping rooms, see *Managing Nonparticipating Properties*.

This topic contains the following topics and is a step in *Roadmap for Managing Property-Specific Event Quotes*:

- *Updating Room Blocks for a Quote*
- *Adding Room Block Line Items to a Quote*
- *Updating Negotiation Rates for a Quote*
- *Reviewing the Room Block Summary Information*

Updating Room Blocks for a Quote

Room blocks are transferred from the opportunity to the quote when the quote is generated, but this information can be updated at the quote stage if necessary. You can add new room blocks at this stage. The Room Blocks view also allows you to start availability and pricing checks.

This task is a step in *Managing Event Room Block Information in Quotes*.

To update room blocks for a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Blocks view tab.
4. In the Room Blocks list, add new records or modify existing records as needed.
5. In each room block record that you add or modify, update the sleeping room tax-related and service charge-related fields if necessary.

   Some fields are described in the following table.

Field	Comments
Tax Inclusive	When selected, indicates that the sleeping room rate includes tax. This applies to all room block line items associated with the room block.
Service Charge Inclusive	When selected, indicates that the sleeping room rate includes a service charge. This applies to all room block line items associated with the room block.

Field	Comments

6. Complete the other fields as required.
7. (Optional) Drill down on the room block Name field.

   Siebel Hospitality displays the Room Block screen, where you can further define or modify the room block.

Adding Room Block Line Items to a Quote

Room block line items are transferred from the opportunity to the quote when the quote is generated, but this information can be updated at the quote stage if necessary. You can add new room block line items at this stage.

Note: In order to add products as line items to a room block, visibility for the product must be set up. For more information, see *Process of Adding Catalog Visibility to Hospitality Products*.

This task is a step in *Managing Event Room Block Information in Quotes*.

To add room block line items to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Blocks view tab.
4. Scroll down to the Room Block Line Items list, and add a record.

   In the Room Block Line Items list, you are allowed only one record with the same Room Type and Day #.
5. Update the sleeping room tax-related and service charge-related fields if necessary.

   Some fields are described in the following table.

Field	Comments
Sub Revenue Category	Revenue subcategory associated with this sleeping room. By default, Siebel Hospitality provides a Sleeping Rooms subcategory. Through the revenue subcategory, the sleeping room is associated with a charge code, which in turn is associated with taxes and service charges. For more information, see *About Hospitality Charge Codes, Taxes, and Service Charges*.
Revenue Parent Category	Read only. Parent revenue category for this sleeping room. Populated by the selection in the Sub Revenue Category field. If you select Sleeping Rooms in the Sub Revenue Category field, the value of this field becomes Sleeping Rooms.
Revenue Category	Read only. Revenue category for this sleeping room. Populated by the selection in the Sub Revenue Category field. If you select Sleeping Rooms in the Sub Revenue Category field, the value of this field becomes Sleeping Rooms.

6. Complete the other fields as required, and save the record.

   Repeat Step 3 through Step 6 to specify additional room block line items.
7. (Optional) Navigate to the Room Block Line Items screen to view details for a room block line item.
8. In the Room Block Line Items list, click Menu and select Check Availability.

Updating Negotiation Rates for a Quote

Negotiation rates for a quote are calculated from the opportunity when the quote is generated. To update negotiation rates for a quote, follow the procedures in this topic.

This task is a step in *Managing Event Room Block Information in Quotes*.

Viewing and Updating Room Block Negotiation Rates

Sales representatives and event managers can see the average rates by weekend, weekday, and so on. These users can give special discounts for sleeping rooms to customers who bringing in a great deal of function space revenue. Additionally, these users can change the default values for tax- and service charge-related options.

To view and update room block negotiation rates

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Blocks view tab.
4. Scroll down and click the Negotiation Rates view tab.
5. Click Calculate Rates.
6. Update the negotiation rate fields if necessary.

   Some fields are described in the following table.

Field	Comments
Negotiation Rate	Validated field. Must be greater than or equal to the value in the Avg Floor field.
Weekend Negotiation Rate	Validated field. Must be greater than the value in the Weekend Floor field.

Changing the Floor Negotiation Rates

The Negotiation Rates - Manager view allows the event manager to change the floor negotiation rates for this specific quote if necessary.

Note: Only the Revenue Manager can change the floor Negotiation Rates.

To change the floor negotiation rates

1. Navigate to the Quotes screen, then the List view.

2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Blocks view tab.
4. Scroll down, and click the Negotiation Rates - Manager view tab.
5. Click Calculate Rates.
6. Update the Avg Floor field and other negotiation rates as necessary.
7. Update the tax- and service charge-related fields if necessary.

   For more information about the tax- and service charge-related fields of the Negotiation Rates views, see *Viewing and Updating Room Block Negotiation Rates*.

Reviewing the Room Block Summary Information

The Room Block Summary provides details about all room blocks for a particular quote and also provides a means of managing all room block details from one view. You can complete all tasks described in *Managing Event Room Block Information in Quotes* from the Room Block Summary view.

The Room Block Summary contains the following form and lists:

- **Date Query Filter form.** The date field allows the sales representative to search for a particular date on which room blocks for a quote exist. When the user has filtered on the date, details of the Room Block are displayed in the two lists.
- **Room Block Summary list.** The Room Block Summary shows the summary information for all room blocks associated with the quote. It shows a summary of each particular room type and the attributes associated with this room type, including the single price of the room, the number of contracted rooms, the number of blocked rooms, the projected number of rooms that are used, and the number of rooms that have been picked up. It does this for each date on which the room type has been blocked.

  It is possible to view Sell Notes and Special dates associated with the room block by clicking the Dates/Notes button in this list. It is also possible to view the total group availability information for each room type by clicking the Available button. The Switch button allows the user to sort the columns by Attribute and then by room type.
- **Line Items list.** The Line Items list allows users to manage line items associated with a room block. This list displays all room blocks, room types, and attributes associated with line items. From this list, it is possible to reserve, overbook, and parcel sleeping rooms. For more information on reserving, overbooking, and parceling rooms, see *Managing Hospitality Inventory*.

  You can edit the room price, the number of contracted rooms, the number of blocked rooms, the projected number of rooms that are used, and the number of rooms that have been picked up. From the menu, it is also possible to reprice sleeping rooms. For more information on room block pricing, see *Applying Quote and Order Pricing*.

This task is a step in *Managing Event Room Block Information in Quotes*.

To review room block summary information

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Quote # field, and then click the Room Block Summary view tab.
4. In the Date field, enter a date on which rooms are booked, and click Search.

   The room block summary information is displayed in the Room Block Summary and Line Items lists.

5. Review and modify information as required.

About Time Shifts for Function Spaces and Sleeping Room Blocks

As part of setting up function spaces and sleeping rooms with relevant attributes, users can perform time shifts of functions and sleeping rooms using the Quote Time Shift view. For more information on time shifting, see *Time Shifting Event Quotes and Event Quote Items*.

This topic is included in *Roadmap for Managing Property-Specific Event Quotes*.

Process of Reviewing Quote Details

As part of the quote management process, you can review quote details and summaries, revenue estimates, negotiation rates, and so on in the Quote screen, Summary view. It is recommended that you review revenue estimates before generating an order to make sure that the information is accurate.

Siebel Hospitality calculates revenue differently according to whether taxes and service charges are applied. Examples of these calculations are set forth in *Scenarios for Calculating Taxes, Service Charges, and Revenues*.

To review quote details, perform the following tasks:

- *Accessing the Quote Summary*
- *Reviewing the Quote Summary Header*
- *Reviewing the Quote Summary Revenue Thresholds*
- *Reviewing the Quote Summary Negotiation Rates*
- *Reviewing the Quote Summary Functions and Function Line Items*
- *Reviewing the Quote Summary Room Blocks and Room Block Line Items*

Note: In the lists of the Quote screen, Summary view, the Core column, when selected, indicates that the item was generated from a meeting package administration record. The Package column displays the name of the associated meeting package, if any. For more information about meeting packages, see *About Meeting Packages*.

This process is a step in *Roadmap for Managing Property-Specific Event Quotes*.

Accessing the Quote Summary

In the Quotes Summary view, you can see the revenue, profit, and availability information for the function spaces and room blocks associated with the quote. To access the quote summary, follow this procedure.

This task is a step in *Process of Reviewing Quote Details*.

To access the quote summary

1. Navigate to the Quotes screen, then the List view.

2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Name field.
4. Click the Summary view tab.
5. View the quote summary information by using the procedures that follow.

   Note: For nonparticipating properties, all of this information is editable, because pricing functionality is not available for nonparticipating properties.

Reviewing the Quote Summary Header

The Summary form displays a summary of the sleeping room, function space, total quote revenue, and profit information.

This task is a step in *Process of Reviewing Quote Details*.

To review the quote summary header

1. Follow the navigation steps of *Accessing the Quote Summary*.
2. View the information in the Sleeping Room Revenue section.
   Some fields are described in the following table.

Field	Comments
Revenue	Sum of the revenue for all sleeping rooms associated with the quote.
Profit	Sum of sleeping room profits for the quote. The profit for a sleeping room is equal to the sleeping room price minus the cost.
Taxes	Sum of sleeping room taxes for the quote.
Service Charges	Sum of sleeping room service charges for the quote.

3. View the information in the Function Space Revenue section.
   Some fields are described in the following table.

Field	Comments
Revenue	Sum of function space revenues for the quote.
Profit	Sum of function space profit for the quote, with each function space profit calculated as function space revenue multiplied by the profit percentage defined for the rental. This is calculated from the rollup of revenue categories in which the Line Item Sum flag is selected.

Field	Comments
Taxes	Sum of function space taxes for the quote.
Service Charges	Sum of function space service charges for the quote.

4. View the information in the Non-Function Revenue section.

   Some fields are described in the following table.

Field	Comments
Revenue	Sum of the nonfunction revenues for the quote.
Profit	Sum of nonfunction profit for the quote, with each nonfunction line item profit calculated as the nonfunction line item revenue multiplied by the profit percentage defined for the associated revenue category.
Taxes	Sum of nonfunction taxes for the quote.
Service Charges	Sum of nonfunction service charges for the quote.

5. View the information in the Total Revenue section.

   Some fields are described in the following table.

Field	Comments
Revenue	Total revenue for the quote, which is the sum of function space revenue, nonfunction revenue, and room block revenue.
Profit	Total expected profit for the quote, which is the sum of function space profit, nonfunction profit, and room block profit.
Taxes	Total taxes for the quote, which is the sum of function space taxes, nonfunction taxes, and room block taxes.
Service Charges	Total service charges for the quote, which is the sum of function space service charges, nonfunction service charges, and room block service charges.

6. View the information in the Sleeping Room Availability section.

   Some fields are described in the following table.

Field	Comments
SR Availability	An aggregate inventory status for all the room block line items. Indicates sleeping room availability with one of the following values: o **Total**. All sleeping room line items associated with the quote are available for use. o **Not Available**. Sleeping room line items are not available for use. o **Partial**. Some sleeping room line items are available for use.
Total Room Nights	Sum of all contracted rooms associated with the quote.
Refresh	When selected, signals you to click Refresh to calculate the correct values on the Quote Summary view.

7. View the information in the Function Space Availability section.

   Some fields are described in the following table.

Field	Comments
FS Availability	An aggregate inventory status for all the functions associated with a quote. Indicates function space availability with one of the following values: o **Total**. All function space line items associated with the quote are available for use. o **Not Available**. Function space line items are not available for use. o **Partial**. Some function space line items are available for use.
Total Square Feet	Sum of the square footage measurements for each function space associated with the quote.
Total # of Covers	Sum of the expected number of attendees for all functions associated with the quote.

8. View the information in the Threshold Variance section.

   Some fields are described in the following table.

Field	Comments
Required Threshold	Sum of the threshold for each function space associated with the quote. For more information on threshold calculations, see *Profit and Revenue Thresholds*.

Field	Comments
Function Space Threshold Information	Function space profit minus the required threshold value. If the value is negative, the quote did not pass the threshold. If the value is positive, the quote passed the threshold.
Function Space Room Rental	Sum of function space rentals for the quote.

Reviewing the Quote Summary Revenue Thresholds

You can view a list of all revenue thresholds for the parent revenue categories associated with the quote. The Revenue Thresholds list shows the overall revenue and profit associated with all functions by parent category, as well as the revenue variance by parent category. The revenue variance can help you to determine how much more revenue you must generate in a particular parent category to meet the required threshold amount for the quote.

If you make changes to the revenue estimates at the category level, as described in *Changing Revenue Category Estimates*, then these changes are reflected in this view.

The taxes and service charges applied to each event item are also displayed in this list. Revenue and profit are calculated differently according to whether or not taxes and service charges apply. For more information about how taxes and service charges apply to revenue results, see *Scenarios for Calculating Taxes, Service Charges, and Revenues*.

This task is a step in *Process of Reviewing Quote Details*.

To review the revenue thresholds for a quote

1. Follow the navigation steps of *Accessing the Quote Summary*.
2. Scroll down to the Revenue Thresholds list, and review the items in the list.

   Some fields are described in the following table.

Field	Comments
Revenue Parent Category/Revenue Category	The parent revenue category of functions and function line items.
Revenue	The revenue associated with the parent category.
Profit %	The profit percentage for the parent category. The Profit % for the category is defined by the administrator using the Property Pricing Admin screen.
Expected Profit	The expected profit for the parent category calculated by multiplying revenue by the profit percentage.

Field	Comments
Revenue Variance	Shows how much more revenue the user has to produce in a particular parent category to meet the required quote threshold amount. This field is calculated by dividing the Threshold Profit Variance by the Profit % of the parent category.

Reviewing the Quote Summary Negotiation Rates

You can view a list of all sleeping room negotiation rates associated with the quote. The Quote Summary Negotiation Rates list shows the negotiation rates associated with the room blocks. This list also shows the taxes and service charges that are related to negotiated rate records. This list displays information similar to information displayed in the Quotes screen, Negotiation Rates view, Room Blocks list. For more information, see *Updating Negotiation Rates for a Quote*.

This task is a step in *Process of Reviewing Quote Details*.

To review the quote summary negotiation rates

1. Follow the navigation steps of *Accessing the Quote Summary*.
2. Scroll down to the Negotiation Rates list, and review the items in the list.

   Some fields are described in the following table.

Field	Comments
Weekend Revenue	Does not include taxes or service charges for items marked tax inclusive or service charge inclusive. This field is populated only for properties that are designated as weekday-weekend properties.
Weekday Revenue	Does not include taxes or service charges for items marked tax inclusive or service charge inclusive.
Tax	Read only. Total taxes for the weekday rate.
Service Charge	Read only. Total service charges for the weekday rate.
Weekend Tax	Read only. Total taxes for the weekend rate. This field is populated only for properties that are designated as weekday-weekend properties. Calculated from the following formula: Tax multiplied by weekend negotiation rate multiplied by number of contracted rooms

Field	Comments
Weekend Service Charge	Read only. Total service charges for the weekend rate. This field is populated only for properties that are designated as weekday-weekend properties. Calculated from the following formula: Service charge multiplied by weekend negotiation rate multiplied by number of contracted rooms

Reviewing the Quote Summary Functions and Function Line Items

The Quote Summary Functions list shows the functions associated with the quote. The information displayed in the Summary view is similar to the information found in the Quote Functions view.

The Function Line Items list displays summary information for all function line items associated with the quote. It is possible to add new line items to this list. For more information about summary line items, see *Managing Functions Associated with Quotes*.

This topic is a step in *Process of Reviewing Quote Details*.

To review the quote summary functions and function line items

1. Follow the navigation steps of *Accessing the Quote Summary*.
2. Scroll down to the Functions list, and review the items in the list.
3. Scroll down to the Function Line Items list, and review the items in the list.

Reviewing the Quote Summary Room Blocks and Room Block Line Items

The Quote Summary Room Blocks list shows all rooms blocks associated with the quote. The list shows information similar to that displayed in the Quotes screen, Room Blocks view.

The Quote Summary Room Block Line Items list shows the room block line items for the selected room block that is associated with the quote. This list displays information that is similar to the Quotes screen, Room Blocks view, Line Items list.

You can add new room blocks and line items to both of these lists. For more information, see *Managing Event Room Block Information in Quotes*.

This topic is a step in *Process of Reviewing Quote Details*.

To review the quote summary functions and function line items

1. Follow the navigation steps of *Accessing the Quote Summary*.
2. Scroll down to the Room Block list, and review the items in the list.

3. Scroll down to the Room Block Line Items list, and review the items in the list.

Scenarios for Calculating Taxes, Service Charges, and Revenues

This topic gives the following examples of how Siebel Hospitality calculates revenue according to whether taxes and service charges are applied. You might use Siebel Hospitality differently, depending on your business model.

- *Tax and Service Charge Not Included*
- *Tax and Service Charge Included*

Note: Revenue does not include taxes or service charges.

In these scenarios, service charges are not taxable. If the business processes of your organization or the regulations of your locale require service charges to be taxed, you can set up service charges as taxable in Siebel Hospitality. For more information, see *Creating a Service Charge*.

Tax and Service Charge Not Included

A customer wants to book an event at a property, including a quantity of sleeping rooms. A sales representative quotes a rate that does not include tax and service charge. The specific rate, charges, and options are shown in the following table.

Charge or Option	Value
Room Rate	100.00
Tax	10 percent
Service Charge	5.00
Tax Inclusive	False
Service Charge Inclusive	False

In this scenario, the calculation returns the values shown in the following table.

Category	Calculation	Amount
Revenue	Room rate	100.00
Tax	10 percent of room rate	10.00

Category	Calculation	Amount
Service Charge	5.00	5.00

Tax and Service Charge Included

A customer wants to book an event at a property, including a quantity of sleeping rooms. A sales representative quotes a rate that includes tax and service charge. The specific rate, charges, and options are shown in the following table.

Charge or Option	Value
Room Rate	100.00
Tax	10 percent
Service Charge	5.00
Tax Inclusive	True
Service Charge Inclusive	True

In this scenario, the calculation returns the values shown in the following table.

Category	Calculation	Amount
Revenue	Ten-elevenths of the sum of room rate minus service charge	86.36
Tax	One-eleventh of the sum of room rate minus service charge (10 percent of revenue)	8.64
Service Charge	5.00	5.00

Reviewing Quote Discounts

Quote discounts can be applied to a quote in a number of different ways, as follows:

- **Full Day Discounts.** For more information about setting up full day discounts, and how these discounts are applied, see *Setting Up Full Day Discounts for Function Spaces*.
- **Volume Discounts.** For more information, see *Setting Up Volume Discounts*.

- **Matrix Discounts.** For more information, see *Setting Up a Matrix Series*.
- **Manually Applied Discounts.** For more information, see *Applying Discount Percentages to Quotes, Functions, Room Blocks, and Line Items* and *Applying a Negotiated or Discount Price to Line Items*.

Note: In order for discounts to be applied to a product, you must make sure that the Disable Discount Flag for the product has not been selected. This can be done using the Administration - Product screen.

To review all quote discounts, for a quote, you must do the following:

- *Applying Discount Percentages to Quotes, Functions, Room Blocks, and Line Items*
- *Applying a Negotiated or Discount Price to Line Items*
- *Reviewing Function Discounts*
- *Reviewing Room Block Discounts*
- *Reviewing the Pricing Waterfall for Function Spaces and Sleeping Rooms*
- *Reviewing the Total Discount for a Quote*

Applying Discount Percentages to Quotes, Functions, Room Blocks, and Line Items

You can apply a discount percentage to each line item, room block, function, and quote. Discounts are applied as follows:

- Line item discount percentages are only applied to line items.
- Function discount percentages are applied to functions and function line items.
- Room Block discount percentages are applied to room block and room block line items.
- Quote discounts are applied to quotes, functions, room blocks and line items.

If you apply a discount at each level, the line item discount is applied to the item first, then the function or room block discount is applied (as appropriate), and finally the quote discount is applied.

To apply a discount percentage to a function or function line items

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. In the Functions list, select the required function, and do the following as required:
    - Enter an appropriate value in the Discount % field for the function.
    - Scroll down to the Line Items tab, select the required function line item, and enter an appropriate value in the Discount % field for the line item.

To apply a discount percentage to a room block or room block line items

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. In the Room Blocks list, select the required room block, and do the following as required:

- Enter an appropriate value in the Discount % field for the room block.
- Scroll down to the Room Block Line Items tab, select the required room block line item, and enter an appropriate value in the Discount Percent field for the line item.

To apply a discount percentage to a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote.
3. On the Quote form, click the Show More button, and scroll down to the Discount Information section of the form.
4. Enter an appropriate percentage value in the Discount field for the quote.

Applying a Negotiated or Discount Price to Line Items

Pricing of function line items and room block line items is performed by an administrator. The administrator defines prices for function spaces, sleeping rooms and catering products. The administrator or event manager can also define negotiation rates for sleeping rooms. The administrator can also define discounts that are automatically applied to quotes. However, it is also possible to manually apply a negotiated price to function line items in a quote, and to manually apply a discount price to room block line items in a quote.

This task is a step in *Reviewing Revenue Estimates for Quote Functions*.

Applying a Negotiated Price to Function Line Items

In function line items for a quote, you can specify a negotiated price. For example, a customer might have special negotiated prices for certain event packages that can be reflected here. You can specify a negotiated price and also specify a discount percent or amount, independently of each other. This allows you to choose, item by item, whether or not to give a discount as well as a negotiated rate.

To apply a negotiated price to a function line item

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. Scroll down to the Line Items tab, and select the required function line item.
5. Enter an appropriate price in the Negotiated Price field.

   This negotiated price becomes the override price for the line item, and is rolled up to the revenue estimates.

Applying a Discount Price to Room Block Line Items

In room block line items for a quote, you can specify a discount price. If you enter a discount price, you cannot enter a discount percentage or a discount amount. The Discount Price, Discount %, and Discount Amount fields are mutually exclusive.

To apply a discount price to a room block line item

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. Scroll down to the Room Block Line Items tab, and select the required room block line item.

5. Enter an appropriate price in the Discount Price field.

   This discount price becomes the new price for the line item, and is rolled up to the revenue estimates.

Reviewing Function Discounts

Discounts can be applied to functions and line items through full day discounts, a matrix series, or by manually applying a discount to a function line item. For more information about full day discounts and matrix series, see *Administering Discount Pricing*. You can view the discount amount for each individual function line item and also the total discount for the function through the Quotes screen, Functions view. When you have viewed the discounts applied to a function and the line items of that function, you can decide whether or not the discount is appropriate. If you want to manually apply a negotiated price instead of or in addition to a discount, see *Applying a Negotiated Price to Function Line Items*.

To view the discount amount for a function line item

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. In the Functions list, select the required function.
5. Scroll down to the Line Items tab, and select the required function line item.
6. Examine the value in the Discount Amount field.

   This value is the summation of all discounts that are applied to the individual line items plus the discount percentage applied to the function.

To view the total discount amount for a function

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. In the Functions list, select the required function.
5. Examine the value in the Total Discount field.

   This value details the total discount for all function line items including the discount percentage applied to the function.

Reviewing Room Block Discounts

Discounts can be applied to room blocks and line items through volume discounts, a matrix series, or by manually applying a discount to a function line item. For more information about volume discounts and matrix series, see *Administering Discount Pricing*. You can view the discount amount for each individual room block line item and also the total discount for the room block through the Quotes screen, Room Blocks view. When you have viewed the discounts applied to a function and the line items of that function, you can decide whether or not the discount is appropriate. If you want to manually override all prices and apply a manual discount price, see *Applying a Negotiated or Discount Price to Line Items*.

To view the discount amount for a room block line item

1. Navigate to the Quotes screen, then the List view.

2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. In the Room Blocks list, select the required room block.
5. Scroll down to the Room Blocks Line Items tab, and select the required line item.
6. Examine the value in the Discount Amount field.

   This value is the summation of all discounts that are applied to the individual line items plus the discount percentage applied to the room block.

To view the total discount amount for a room block

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. In the Room Blocks list, select the required function.
5. Examine the value in the Total Discount field.

   The Total Discount field is equal to the summation of the Line Items Discounts plus the Negotiation Rates discount.

Reviewing the Pricing Waterfall for Function Spaces and Sleeping Rooms

The pricing waterfall is a dialog box that you can use to examine how a line item has been priced or how the price has changed since the quote was generated. For example, if a sleeping room originally had a benchmark price of $150 dollars, and a discount amount of $20, then the waterfall shows the original price of the room and also the adjusted price ($130) of the room. This is also true of function spaces and catering products. This pricing waterfall dialog box allows you to view all adjustments made to a line item from the time that the quote was generated.

To view the pricing waterfall for function line items

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Name field, and then click the Functions tab.
4. Scroll down to the Line Items tab, and select the required function line item.
5. Click the link in the Unit Net Price field.

   The pricing waterfall for the selected line item is displayed.

To view the pricing waterfall for room block line items

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. Click the link in the Quote # field, and then click the Room Blocks tab.
4. Scroll down to the Room Block Line Items tab, and select the required room block line item.
5. Click the link in the Single Price field.

   The pricing waterfall for the selected line item is displayed.

Reviewing the Total Discount for a Quote

The total discount for a quote is equal to the summation of all the discounts that are applied to functions and room blocks. This value can be used in conjunction with the quote revenue to see the value of the quote.

To view the total discount for a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote.
3. On the Quote form, click the Show More button, and scroll down to the Discount Information section of the form.
4. Review the value in the Total Discount field.

Reviewing Revenue Estimates for Quote Functions

The Functions Revenue Estimates view shows the estimated revenue for both the sum of the line items and the average values for the quote. Because function revenues are associated with parent categories for revenue rollup purposes, the revenue estimates appear according to parent category, but can be viewed by category by clicking the Expand All button.

Revenue estimates are not available for quotes associated with nonparticipating properties because pricing information for functions, room blocks, and their line items must come from the NPP. For more information about nonparticipating properties, see *Managing Nonparticipating Properties*.

This topic contains the following topics and is a step in *Roadmap for Managing Property-Specific Event Quotes*:

- *Reviewing Parent Revenue Category Revenue Estimates*
- *Changing Revenue Category Estimates*

Reviewing Parent Revenue Category Revenue Estimates

Review the parent category revenue estimates from the Revenue Estimates view. Parent Category estimates take into account the revenue estimates for functions, their subfunctions, and child subfunctions. The topic details how to review function revenue estimates, and also details how these estimates are calculated for functions with subfunctions.

Reviewing Function Revenue Estimates

When reviewing the revenue for function space rental, the values contained in the fields might reflect a number of different function spaces. This is because the revenue totals for all active function spaces are reflected in this view. If you switch from a function space to its backup space, more than one active space might exist. For more information about switching, see *Switching a Function to the Backup Space*.

This task is a step in *Reviewing Revenue Estimates for Quote Functions*.

To review function revenue estimates

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.

3. In the Quote record, click the link in the Name field.
4. Click the Functions view tab, and select the function in the list.
5. Scroll down, and click the Revenue Estimates view tab.
6. In the Revenue Estimates list, review the information.

   The following table describes some of the fields.

Field	Comments
Parent Revenue Category/Revenue Category	The parent revenue category and revenue category with which function space revenues are associated.
Projected Revenue - Total	Default value is the Average Value Total. The user can update the value after consulting with the customer during the quote process.
Projected Revenue Per Person	Displays the projected revenue for each attendee. The Projected Revenue Total is divided by the Set number of attendees. If the Set number is unknown, then the Projected Revenue Total is divided by the Guaranteed number of attendees. If the Guaranteed number is unknown, then it is divided by the Projected number of attendees. If the projected number is unknown, then it is divided by the expected number of attendees.
Average Value Total	Shows the average value for a given function type or business type on the date of the function by parent category. This value is set by the revenue managers as a guideline.
Average Value Per Person	Displays the average value for each attendee. The Average Value Total is divided by the Set number of attendees. If the Set number is unknown, then the total is divided by the Guaranteed number of attendees. If the Guaranteed number is unknown, then the total is divided by the Projected number of attendees. If the Projected number is unknown, then the total is divided by the Expected number of attendees.
Line Item Expected Profit	Displays the expected profit for the sum of the line items. Calculated by multiplying Total Line Item Revenue by the profit percentage of that particular Parent Revenue category.
Total Line Item Revenue	Sum of the revenue for the line items including functions and subfunctions.

Field	Comments
Total Line Item Revenue - Function	Sum of the projected revenue for the selected function.
Total Line Item Revenue - Sub Function	Sum of the projected revenue for all subfunctions associated with the selected function.
Per Person Line Item Revenue	Displays the line item revenue for each attendee. Total Line Item Revenue divided by the Set number of attendees. If the Set number is unknown, then the revenue is divided by the Guaranteed number of attendees. If the Guaranteed number is unknown, then the revenue is divided by the Projected number of attendees. If the Projected number is unknown, then the revenue is divided by the Expected number of attendees.
Projected Profit	Displays the projected profit for the function. Calculated by multiplying the Projected Revenue Total by the profit percentage defined in the Property Pricing Admin screen, Profit Series view.
Service Charge	Displays the total service charges for the function.
Tax	Displays the total taxes for the function.

Overriding the Average Values for Subfunction Categories

During the initial setup of the average values of a property, the revenue manager assigns average values to the various function types that exist at a property. The revenue manager uses past history to estimate the average revenue contributions associated with each function type.

During the opportunity capture stage, the sales representative might not fill in all information about a function, and might decide to keep the function details at a very high level. As a result, only the details of the main functions might have been added to the event agenda, and not subfunction details.

This means that when the sales representative decides to detail the function by adding subfunctions, the revenue contributions are added twice to the function. This is because some of the categories for the function can be added at both the function level initially and then at the subfunction level when the function is detailed. For example, a Meeting function can be added to an opportunity with an Audio Visual and Coffee Break revenue contribution.

Later, the sales representative might decides to add the Coffee Break as a subfunction of the main function. In this case, the revenue contribution for the function has been added twice. In order to make sure that the revenue contribution is

not mistakenly counted twice, an average value override for subfunctions has been put in place in Siebel Hospitality. This average value override is subject to a number of rules as follows:

- Rule 1: The subfunction category revenue estimate takes precedence over the estimate that exists at the parent function level.
- Rule 2: Multiple subfunction revenues of the same category are added together.
- Rule 3: The subfunction category revenue override facility overrides one function level higher than the level at which it exists.

The rules for function category average value overrides are illustrated in the following examples:

- Example 1: One main function that contains two subfunctions
- Example 2: One Main Function that Contains a Subfunction and a Child Subfunction of the Subfunction

Example of a Function with Two Subfunctions

The following table provides the details of the main function.

Function Name	Function Type	Parent Category	Category	Revenue
Function 1	Meeting	Food	(Not applicable)	130 (Total revenue)
			Lunch	100
			Coffee Break	30

The following table provides the details of the first subfunction.

Function Name	Function Type	Parent Category	Category	Revenue
Subfunction 1	Coffee	Food	(Not applicable)	45 (Total revenue)
			Coffee Break	45

If the user indents Subfunction 1 under Function 1, then Rule: 1 applies; The subfunction category revenue estimate takes precedence over the estimate that exists at the parent function level. The following table shows the changes to Function 1 when Subfunction 1 is indented.

Function Name	Function Type	Parent Category	Category	Revenue
Function 1	Meeting	Food	(Not applicable)	100 (Total revenue)
			Lunch	100
			Coffee Break	0

The Coffee Break revenue is overridden and is set to 0 at the parent function level. This means that the revenue estimate that is displayed at the quote level would be as shown in the following table.

Parent Category	Category	Revenue
Food	(Not applicable)	145 (Total revenue)
	Lunch	100
	Coffee Break	45

At this stage, the sales representative decides to add another subfunction to the parent function, Function 1. The following table shows the details of this subfunction.

Function Name	Function Type	Parent Category	Category	Revenue
Subfunction 2	Meeting	Food	(Not applicable)	25 (Total revenue)
			Coffee Break	25

When this subfunction is added, Rule: 2 is applied; Multiple subfunction revenues of the same category are added together. This is shown in the following table.

Function Name	Function Type	Parent Category	Category	Revenue
Subfunction 1 + 2	Meeting	Food	Coffee Break	70
Subfunction 1	Meeting	Food	Coffee Break	45
Subfunction 2	Meeting	Food	Coffee Break	25

The revenue estimate that is now displayed at the quote level is shown in the following table.

Parent Category	Category	Revenue
Food	(Not applicable)	170 (Total revenue)
	Lunch	100
	Coffee Break	70

Example of a Function with a Subfunction and a Child Subfunction

The following table provides the details of the main function.

Function Name	Function Type	Parent Category	Category	Revenue
Function 1	Meeting	Food	(Not applicable)	130 (Total revenue)
			Lunch	100
			Coffee Break	30

The following table provides the details of the subfunction.

Function Name	Function Type	Parent Category	Category	Revenue
Subfunction 1	Coffee	Food	(Not applicable)	45 (Total revenue)
			Coffee Break	45

If the user indents Subfunction 1 under Function 1, then Rule: 1 applies; The subfunction category revenue estimate takes precedence over the estimate that exists at the parent function level. The revenue estimate that is displayed at the quote level would be as shown in the following table.

Parent Category	Category	Revenue
Food	(Not applicable)	145 (Total revenue)
	Lunch	100
	Coffee Break	45

The sales representative then decides to add a child subfunction to the existing function. The details of this child subfunction are shown in the following table.

Function Name	Function Type	Parent Category	Category	Revenue
Child Subfunction 1	Coffee	Food	(Not applicable)	25 (Total revenue)
			Coffee Break	25

The following table shows the changes to the Subfunction 1 when Child Subfunction 1 is indented.

Function Name	Function Type	Parent Category	Category	Revenue
Function 1	Meeting	Food	(Not applicable)	0 (Total revenue)
			Coffee Break	0

Rule 3 is the applied: The subfunction category revenue override facility overrides one function level higher than the level at which it exists. The revenue estimate that is displayed at the quote level would then be as shown in the following table.

Parent Category	Category	Revenue
Food	(Not applicable)	125 (Total revenue)
	Lunch	100
	Coffee Break	25

Changing Revenue Category Estimates

When you have reviewed the parent category estimates, you might decide to change the revenue estimates for individual categories in the parent category. You can perform this task by expanding all parent categories to view all categories, and changing the required category. Any changes made to categories are rolled up to the parent category, and are reflected in the Revenue Estimates view.

This task is a step in *Reviewing Revenue Estimates for Quote Functions*.

To change revenue category estimates

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the Quote record, click the link in the Name field.
4. Click the Functions view tab, and select the function in the list.
5. Scroll down, and click the Revenue Estimates view tab.
6. Click Expand All.

   All parent categories are expanded, and categories are displayed underneath the appropriate parent category and are indented in a tree structure.
7. Select the required category record, make changes as necessary, and save the record.

   The changes are rolled up to the parent revenue category for the quote.

Reviewing Macro Estimates for Quotes

Macro estimates are used to estimate the approximate value at the early stages of an opportunity. However, when function agendas and room blocks are attached to the opportunity, more accurate revenue estimates can be generated for the quote from the function and room block line items.

When a quote is generated from an opportunity, the Macro Estimates for the opportunity are transferred to the quote. Although Macro Estimates are generally defined at the opportunity stage, you can make changes to these estimates after the quote has been generated if more accurate information becomes available.

The forecasted revenue for a quote is derived from the revenue estimates for the quote. The forecasted revenue for a quote can be seen in the Quote Revenue field on the quote form. However, on occasion, you might override the revenue estimates and use the macro estimates to generate the forecast for the Quote Revenue.

Macro estimates are not available for nonparticipating properties, as pricing information must come from the NPP, rather than the organization that has created the opportunity. For more information about nonparticipating properties, see *Managing Nonparticipating Properties*.

This task is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To review the macro estimates for a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote.
3. In the Quote record, click the link in the Name field.
4. Click the Macro Estimates view tab, review the estimates, and then make any changes necessary.

To generate macro estimates for a quote revenue forecast

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. Scroll down to the Quote form.
4. In the Revenue & Pricing Information section of the form, select the Macro Estimates flag check box, and then save the record.

   The Quote Revenue field is populated with the sum of all Calculated Total Revenues for the macro estimates.

Viewing the Quote Event Calendar

The Quote Event calendar provides a visual timetable of quotes in a calendar format. This calendar can be viewed in daily, weekly, or monthly format. As this calendar is a quotes calendar, the user must be a member of the Quotes team to be able to use it. Quotes are displayed in the calendar according to the arrival date of the customer. The Quote Event Calendar helps event managers allocate work and gives sales representatives a visual depiction of the customers scheduled to visit a property during a given period of time.

Event managers at certain properties might post paper printouts of calendars to inform the operations staff of upcoming events. The calendar can be printed from a Microsoft Word file to make sure that the calendar format is retained.

This task is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To view the quote event calendar

1. Navigate to the Quotes screen, then the Calendar view.
2. Select either the Weekly or Monthly view tab.
   The Weekly calendar is displayed by default.

To print the quote event calendar

1. Navigate to the Quotes screen, then the Calendar view.
2. Select the appropriate calendar view, and weekly or monthly calendar format.
3. Click Print.
4. The calendar is displayed in a secondary Calendar pop-up window, and the Print dialog box appears.
5. Print the calendar to a local printer.

Analyzing Quotes, Functions, and Room Blocks with Charts

Siebel Hospitality provides you with the ability to analyze quotes, functions, and room blocks using a variety of different chart formats including pie charts and bar charts. Quotes, functions, and room blocks at all stages can be viewed as charts. Information can include definite, lost/turndown, canceled, T1/T2, prospects, actualized, recurring, and host/affiliate quotes, functions, and room blocks.

This task is a step in *Roadmap for Managing Property-Specific Event Quotes*.

To display charts that analyze quotes

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the records to analyze in a chart.
3. Click the Charts link.
4. From the Charts view, select the chart type to view from the list.
   For example, you could select the Account Analysis, Account Discount Analysis, Rep Discount Analysis, Status Analysis by Rep, Room Block Analysis, or Quote Property Analysis chart.
5. From the Chart Format drop-down list, select the format in which to view the analysis.
   For example, you could select 3dBar or 3rd Pie, and so on.

To display charts that analyze functions

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for the records to analyze in a chart.
3. Click the Chart link.

4. Select either the Function Status In Time or Function Type Analysis chart tab.
   For the Function Type Analysis chart, you can view the chart for either Group or Local Business.
5. Select the frequency (day, week, or month) of the functions from the By: list.
6. Select the chart format.
   For example, you could select 3dBar, 3d Stacked Bar, and so on.

To display charts that analyze function revenues

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for the required function.
3. Click the link in the Name field, and then click the Revenue Analysis view tab.
4. Click either the Revenue Category or Parent Revenue Category link as required.
5. Select the chart format from the drop-down list.
   For example, you could select 3dBar, 3d Stacked Bar, and so on.

To display charts that analyze room blocks

1. Navigate to the Room Blocks screen, then the Room Blocks List view.
2. In the Room Blocks list, query for the records to analyze in a chart.
3. Click the link in the name field, and then click the Room Type Analysis view tab.
4. From this Charts view, select the chart type to view from the list.
   For example, you could select the Room Type Analysis, Blocked, Picked Up, or Total Group Available chart.
5. Select the chart format from the drop-down list.
   For example, you could select 3dBar, 3d Stacked Bar, and so on.
6. Select the frequency (day, week, or month) of the functions from the By: list.
7. Click Go.
   The required chart is displayed.

Process of Managing Meeting Packages in a Quote

You can book a meeting package for a specific event by associating it with a quote. Within the context of that quote, you can manage the various components of the meeting package. For more information about meeting packages, see *About Meeting Packages*.

When a meeting package is booked, components associated with a meeting package administration record are automatically created as associated objects for that booking. These items are known as *core* components. Items that are not associated with any meeting package administration record are known as *noncore* components. A noncore item can be manually associated with a meeting package within the quote.

Many of the same fields in core items and noncore items have different default values, editing characteristics, and interactions with other fields. Some of these differences are described in *About Core and Noncore Field Behaviors in Quotes*.

Siebel Hospitality calculates pricing details in special ways for quotes that include meeting packages. Examples and formulas for these calculations are shown in *About Quote Pricing for Meeting Packages*.

To manage meeting packages in a quote, perform the following tasks:

1. *Adding Meeting Packages to a Quote*
2. *Managing Functions and Function Line Items in a Quote Meeting Package*
3. *Managing Nonfunction Line Items in a Quote Meeting Package*
4. *Updating Function and Nonfunction Line Item Prices for a Meeting Package in Quotes*
5. *Updating Room Block Line Item Prices for a Meeting Package*
6. *Managing Room Blocks and Room Block Line Items in a Quote Meeting Package*
7. *Modifying Arrival Dates in a Quote Meeting Package*
8. *Time Shifting a Quote Meeting Package*

Adding Meeting Packages to a Quote

You can add property-specific meeting packages to a quote.

This topic is a step in *Process of Managing Meeting Packages in a Quote*.

To add a meeting package to a quote

1. Navigate to the Quotes screen, then the List view.
2. Find a quote to which you want to add a meeting package and click the link in the Name field.
3. Click the Meeting Packages view tab.
4. In the Meeting Packages list, create a new record.
5. In the Name field, select a meeting package to associate with the current quote.

   The selection list is constrained to show only meeting packages associated with the property of the quote, and only those meeting packages that are valid for the Arrival Date and Departure Date of the quote.
6. Complete the other fields, as required.

   Some fields are described in the following table.

Field	Comments
Display Name	Name of the package. The default value is the Display Name from the meeting package administration record. Must be unique.
Action	Specifies the action to apply to this meeting package when you click Apply Package in Step 9 of this procedure. Values are as follows: ○ **Add.** (Default) Adds the meeting package functions to the quote without changing any existing functions or room blocks carried over from the opportunity from which the quote was generated. ○ **Override.** Deletes any existing non-meeting package functions and room blocks carried over from the opportunity from which the quote was generated, and then adds the meeting package items. ○ **Update.** Identifies existing items in the quote that match the items in the meeting package, and associates those items with the meeting package. Items in the meeting package that do not exist in the quote are added to the quote. Existing attendance figures are overwritten by the numbers you enter in the date columns in Step 7 of this procedure.
Start Date	Along with the Duration (Days) field, this field specifies when the meeting package is applied. The value must be within the valid dates for the meeting package.

Field	Comments
Duration (Days)	Along with the Start Date field, this field specifies when the meeting package is applied. The value must be greater than 0. If the Min Duration or Max Duration field is populated in the meeting package administration record, this field must have a value that is either equal to the Min Duration or Max Duration field value, or between the two numbers. For example, if Min Duration is 2 and Max Duration is 5, then the valid Duration (Days) values are 2, 3, 4, and 5.

Note: You can add the same meeting package to a quote more than once, even if the dates are the same, if the Start Time field values are different. You can add the same meeting package to a quote more than once for the same dates and times if the Display Name field values are different.

7. Save the new meeting package record.

   When a meeting package is associated with a quote and saved, Siebel Hospitality dynamically creates the rows and columns in the Meeting Package Details list. You cannot manually add or delete records in this list.

   Each SR Type (that is, sleeping room type) in the meeting package generates a row in the Meeting Package Details list with four child rows, one for each of the four occupancies (Single, Double, Triple, and Quad). If the meeting package has components with an Applies To field value of DD, then one Day Delegate record is created.

   Siebel Hospitality adds the day and date columns according to the values in the Start Date and Duration (Days) fields of the current meeting package record. For example, if Start Date is 1/15/2012 and Duration (Days) is 3, then three columns for January 15, 2012 and the next two consecutive days are created.
8. Complete the fields in the rows of the Meeting Package Details list.

   Some fields are described in the following table. In the table, “SR Type" refers to the sleeping room type field value that is set in the meeting package administration record.

Field	Comments
Name	Read only. Value is either Day Delegate or an SR Type.
Room Allocation	Read only. The adjusted price for each room, derived from the meeting package administration record.
List Pkg Price/Day	Read only. The calculated price per day. This value includes the allocations for all items and rooms.
(day and date fields)	Enter the expected number of attendees per day in each SR Type occupancy row and Day Delegate row. These values control the quantities for function line items, nonfunction line items, and sleeping rooms.

Field	Comments
	○ In the child SR Type rows, enter the number of rooms needed for each day of the event. Siebel Hospitality then calculates the total number of rooms of each occupancy for each day. This total is displayed in the parent SR Type row, in which the fields are read only. ○ In the Day Delegate record, enter the number of day delegate attendees for each day of the event.

9. Click Apply Package.

   Siebel Hospitality applies the validations described in *About Apply Package Validations*. Additionally, Siebel Hospitality validates that, if the Action is Override in the quote record, an event check has not already been posted for the quote.

   If the new record passes the validations, then Siebel Hospitality creates the functions, function line items, nonfunction line items, room blocks, and room block line items for the meeting package according to the value in the Action field of the meeting package. Siebel Hospitality calculates the package price per day for each package type for each SR Type from the number of attendees and rooms, and displays these values in the List Pkg Price/Day fields of the Meeting Package Details list.
10. Display more or less detail in the Meeting Package Details list by doing the following:
    - Click Expand All to display all occupancies for all SR Types.
    - Click Collapse All to display only the SR Types and hide the occupancies.

About Apply Package Validations

When you associate a meeting package with a quote and click Apply Package, Siebel Hospitality validates the following details of the meeting package record:

- The meeting package administration record still exists.
- The meeting package dates on the quote are eligible (that is, the dates on the quote are within the Effective Dates of the meeting package administration record).
- The number of days on the quote is equal to or greater than the minimum duration of the meeting package.
- The number of days on the quote does not exceed the maximum duration of the meeting package.
- The number of attendees on the quote meets the minimum number of DD and CMP attendees specified for the meeting package.
- If the Min Duration is equal to the Max Duration in the meeting package administration record, the number of CMPs and the occupancies for each room on the quote are the same for each day.

If any of these validations fail, then Siebel Hospitality displays a warning or error message, as appropriate, and stops the process.

Managing Functions and Function Line Items in a Quote Meeting Package

You can associate noncore functions and function line items with a meeting package that is already associated with the quote.

This topic covers the following subjects:

- *Associating Functions with a Quote Meeting Package*
- *Associating Function Line Items with a Quote Meeting Package*

You can also associate noncore nonfunction line items with a meeting package that is already associated with a quote. For more information, see *Managing Nonfunction Line Items in a Quote Meeting Package*.

This topic is a step in *Process of Managing Meeting Packages in a Quote*.

Associating Functions with a Quote Meeting Package

Within a quote, noncore functions can be associated with and disassociated from a meeting package. The following restrictions apply:

- You can add a function to a quote meeting package only if the function date falls within the meeting package dates on the quote.
- You can create a new function and add it to a quote meeting package only if the item is a per day item or if the item is a per stay item *and* the Min Duration and Max Duration in the meeting package administration record are the same.
- A core meeting package function cannot be deleted. A noncore function that is manually added to a meeting package can be edited or deleted.

To associate a function with a quote meeting package

1. Follow the steps of *Adding Functions to a Quote*.
2. In the Package field, select a meeting package with which to associate this function.

   Selection options are constrained to meeting packages that are already associated with the current quote.
3. Complete the other fields, as required.

   Some fields are described in the following table.

Field	Comments
Expected	The default value is the value that was entered before the function was associated with the meeting package. This field is editable for noncore meeting package items.
Projected	The projected number of attendees for the function. Modifying this field does not initiate or change any calculations; this field is for forecasting purposes only.
Guaranteed	The number of paid attendees that the customer has guaranteed for the event.
Actual	The number of attendees that actually attend the event.
Posting Rhythm	Selection options are Per Day and Per Stay.
Function Space	The function space in which the event will occur. Selection options include all function spaces for the current property.

Field	Comments
Line Item Sum	If a meeting package is selected in the Package field, then this field is selected by default and is read only.
Discount %	If a meeting package is selected in the Package field, then this field is read only. A function cannot be discounted if it is part of a meeting package.

Associating Function Line Items with a Quote Meeting Package

Within a quote, noncore line items can be associated with and disassociated from functions that are associated with a meeting package. The following restrictions apply:

- Core line items cannot be deleted. However, noncore line items can be deleted.
- If a noncore function has line items and you associate that function with a meeting package, then you must manually associate the line items with the parent function meeting package.

To associate a function line item with a quote meeting package

1. Follow the steps of *Adding Function Line Items to a Quote*, selecting a function that is associated with a meeting package.
2. Complete the fields of the function line item, as required.

   Some fields are described in the following table.

Field	Comments
Package	The default value is the meeting package associated with the parent function. You can delete the meeting package value, but you cannot select a different meeting package. **CAUTION:** If a noncore function has line items and you update the Package field on the function, the updated value does not automatically cascade to the Package fields of the associated function line items. You must manually update the Package fields on the line items as necessary.
Negotiated Price	When a noncore function line item is associated with a meeting package, the Negotiated Price field is set to 0. If you want to charge for a noncore function line item, then do not associate it with a meeting package. For more information, see *Adding Function Line Items to an Order Meeting Package*.
Substitutes	If a substitute is selected, the Negotiated Price remains the same as for the original item.

Managing Nonfunction Line Items in a Quote Meeting Package

You can manage nonfunction line items in a quote meeting package by adding noncore items and editing core items. You can manually associate noncore nonfunction line items with a quote meeting package if any one of the following conditions applies:

- The item is a Per Day item.
- The item is a Per Stay item, the Min Duration and Max Duration field values of the meeting package are the same, and the number of attendees and occupancies is the same for each day of the event.

This topic is a step in *Process of Managing Meeting Packages in a Quote*.

To manage nonfunction line items in a quote meeting package

1. Navigate to the Quotes screen, then the List view.
2. Find a quote for which you want to manage nonfunction line items and click the link in the Name field.
3. Click the Non Function Line Items view tab.

   The Non Function Line Items list displays core items from the meeting packages associated with the current quote, and noncore items that have been added manually.
4. To add a noncore item, in the Non Function Line Items list, create a new record.
5. To associate a noncore item with a meeting package, make a selection in the Package field.

   Selection options in the Package field are constrained to meeting packages associated with the quote.
6. Complete the other fields, as required.

   Some fields are described in the following table.

Field	Comments
Unit Net Price	Read only. Calculated from the Negotiated Price or the List Price.
Extended Net Price	Read only. Calculated from the Unit Net Price multiplied by the Extended Qty.

7. Click Reprice All to recalculate the item prices.

   - Noncore line items are repriced using the Arrival Date of the quote to update the list prices from the applicable price list.
   - Core line items are not affected.

   For more information about repricing, see *Reprice All Button*.

For more information about managing nonfunction line items that are associated with a quote, see *Adding Nonfunction Line Items to a Quote*.

Updating Function and Nonfunction Line Item Prices for a Meeting Package in Quotes

You can update function and nonfunction line item prices for a meeting package.

This topic is a step in *Process of Managing Meeting Packages in a Quote*.

To update function line items prices for a meeting package, follow this procedure.

To update function line item prices for a meeting package

1. Navigate to Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Functions view tab.
5. Select a Function and scroll down to the Line Items list.
6. In the Line Items list, select a core line item.
7. In the Line Item view, click Menu and select Adjust Meeting Package Price.

   > **Note:** The Adjust Meeting Package Price is disabled for non-core line items and also when Event Check is posted for the function order.

8. In the Adjust Meeting Package Price window, do one of the following:

   > **Note:** For the DD/CMP Function, DD Pkg Price/Day, and CMP Pkg Price/Day, both are enabled in the Adjust Meeting Package Price window.

   a. For DD Pkg Price / Day New Value field, enter the new value.

      > **Note:** For the DD Function, CMP Pkg Price/Day is disabled in the Adjust Meeting Package Price window.

   b. For the CMP Pkg Price New Value field, enter the new value. This value excludes guest rooms.

      > **Note:** For the CMP Function, DD Pkg Price/Day is disabled in the Adjust Meeting Package Price window.

   c. For the Negotiated Price New Value field, enter the new value.
   d. Click Calculate to view the new pricing results.
   e. Click OK to save your changes.

   > **Note:** You can either provide a new value in DD Pkg Price/Day New Value field or enter the new value in the Negotiated Price New Value field. Only one new value can be entered.

To update nonfunction line items prices for a meeting package, follow this procedure.

To update nonfunction line item prices for a meeting package

1. Navigate to Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.

3. In the Quote record, click the link in the Quote # field.
4. Click the Non Function Line Items view tab.
5. Select a Non Function Line Item, and scroll down to the Line Items list.
6. In the Line Items list, select a core line item.
7. In the Line Item view, click Menu and select Adjust Meeting Package Price.
8. In the Adjust Meeting Package Price window, do one of the following:
    a. For DD Pkg Price / Day New Value field, enter the new value.
    b. For the CMP Pkg Price New Value field, enter the new value. This value excludes guest rooms.
    c. For the Negotiated Price New Value field, enter the new value.
    d. Click Calculate to view the new pricing results.
    e. Click OK to save your changes.

Updating Room Block Line Item Prices for a Meeting Package

You can update room block line item prices for a meeting package.

This topic is a step in *Process of Managing Meeting Packages in a Quote*.

To update room block line items prices for a meeting package, follow this procedure.

To update room block line item prices for a meeting package from negotiated rates

1. Navigate to Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field
4. Click the Room Blocks view tab.
5. Select a Core Room Block, and scroll down to the Negotiated Rates list.
6. In Quotes Room Block Negotiation Rates View do the following:
    a. Select any Core Room Block Line Item.
    b. Click Menu.
    c. Select Adjust Meeting Package Price.
7. In the Adjust Meeting Package Price window, do one of the following:
    a. For Pkg Price/Day New Value field, enter the new value.
    b. For the Negotiated Price New Value field, enter the new value.
    c. Click Calculate to view the new pricing results.
    d. Click OK to save your changes.

> **Note:** You can either provide a new value in Pkg Price/Day field or enter the new value in the Negotiated Price field. Only one new value can be entered.

To update Negotiated Rates Manager prices for a meeting package, follow this procedure.

To update room block line item prices for a meeting package from negotiated rates manager

1. Navigate to the Quotes screen, then the List view.

2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. Select a Core Room Block, scroll down, and click the Negotiated Rates Manager tab.
6. In the Quote Room Block Negotiation Rates View - Manager view, do the following:
    a. Select any core room block line item.
    b. Click Menu.
    c. Select Adjust Meeting Package Price.
7. In the Adjust Meeting Package Price window, do one of the following:
    a. For Pkg Price/Day (Including Guest Room) New Value field, enter the new value.
    b. For the Negotiated Price New Value field, enter the new value.
    c. Click Calculate to view the new pricing results.
    d. Click OK to save your changes.

Managing Room Blocks and Room Block Line Items in a Quote Meeting Package

When a meeting package is added to a quote, Siebel Hospitality adds room blocks and room block line items, if any, from the meeting package administration record. You cannot manually add room blocks or room block line items to a quote meeting package. Noncore room blocks and room block line items that are associated with a quote cannot be associated with a meeting package. Core room blocks cannot be deleted. If a core room block is copied, the resulting room block and room block line items are not associated with the meeting package. You cannot transfer rooms into or out of a core room block.

For more information about managing room blocks and room block line items that are associated with a quote, see *Managing Event Room Block Information in Quotes*.

This topic covers the following subjects:

- *Managing Room Blocks in a Quote Meeting Package*
- *Managing Room Block Line Items in a Quote Meeting Package*
- *Managing Room Block Negotiation Rates for a Quote Meeting Package*
- *Managing Room Block Floor Negotiation Rates for a Quote Meeting Package*

This topic is a step in *Process of Managing Meeting Packages in a Quote*.

Managing Room Blocks in a Quote Meeting Package

To manage room blocks for a quote meeting package, follow this procedure.

To manage a room block in a quote meeting package

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select a quote with an associated meeting package.
3. In the Quote record, click the link in the Name field, and then click the Room Blocks view tab.
4. In the Room Blocks list, query for records with one of the following values:
    - Core check box is selected.

- Package field value of IS NOT NULL.

5. Select a core room block record.
6. Complete or edit the fields as required.

   Some fields are described in the following table.

Field	Comments
Service Charge Inclusive	Read only. This field is populated according to the setting of the Srv Charge Inclusive check box in the associated meeting package.
Tax Inclusive	Read only. This field is populated according to the setting of the Tax Inclusive check box in the associated meeting package.

For more information about managing room blocks in a quote, see *Updating Room Blocks for a Quote*.

Managing Room Block Line Items in a Quote Meeting Package

To manage room block line items for a quote meeting package, follow this procedure.

To manage a room block line item in a quote meeting package

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select a quote with an associated meeting package.
3. In the Quote record, click the link in the Name field, and then click the Room Blocks view tab.
4. In the Room Blocks list, query for records with one of the following values:
   - Core check box is selected.
   - Package field value of IS NOT NULL.
5. Select a core room block record.
6. Scroll down to the Room Block Line Items list and select a record.
7. Complete or edit the fields as required.

   Some fields are described in the following table.

Field	Comments
Projected	The projected number of sleeping rooms needed for the function. This field is for forecasting only. In core items, modifying this field does not change or initiate any calculations.
Blocked	The number of rooms blocked for the event. This field is for forecasting only. In core items, modifying this field does not change or initiate any calculations.
Benchmark Price	Read only. The benchmark rate for each room type is defined as an item in the pricing matrix of the property.

Field	Comments
Single Price	Read only. The value in this field is calculated from the price adjustment in the meeting package administration record for this SR type.
Discount Amount	Read only. If the Adjustment Type is Discount Amount or Markup Amount in the meeting package administration record, then this field displays a value.
Discount %	Read only. If the Adjustment Type is Discount % or Markup % in the meeting package administration record, then this field displays a value.
Adjusted Single Adjusted Double Adjusted Triple Adjusted Quad	Read only. The values of these fields are set from the values for each corresponding SR Type in the Quotes screen, Meeting Packages view. The meeting package values override the values set in Room Block Info.

8. If more core rooms are needed, do the following:
    a. Navigate to the Quote screen, Meeting Packages view.
    b. Enter additional attendance figures.
    c. Reapply the meeting package to the quote.

    For more information, see *Adding Meeting Packages to a Quote*.

For more information about managing room block line items in a quote, see *Adding Room Block Line Items to a Quote*.

Managing Room Block Negotiation Rates for a Quote Meeting Package

For a room block that is part of a quote, you can calculate and view the average room rates by weekday, weekend day, and so on. To calculate and view room block negotiation rates for a quote meeting package, follow this procedure.

To manage room block negotiation rates for a quote meeting package

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select a quote with an associated meeting package.
3. In the Quote record, click the link in the Name field, and then click the Room Blocks view tab.
4. In the Room Blocks list, query for records with one of the following values:
    - Core check box is selected.
    - Package field value of IS NOT NULL.
5. Select a core room block record and click the Negotiation Rates subview tab.
6. In the Negotiation Rates list, click Calculate Rates.

    Siebel Hospitality updates the fields, as appropriate, from the rates you entered.

7. Select a record and view the information in the fields.

For more information about room block negotiation rates in a quote, see *Viewing and Updating Room Block Negotiation Rates*.

Managing Room Block Floor Negotiation Rates for a Quote Meeting Package

For a room block that is part of a quote, event managers can change the floor negotiation rates. To manage room block floor negotiation rates for a quote meeting package, follow this procedure.

To manage room block floor negotiation rates for a quote meeting package

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select a quote with an associated meeting package.
3. In the Quote record, click the link in the Name field, and then click the Room Blocks view tab.
4. In the Room Blocks list, query for records with one of the following values:
    - Core check box is selected.
    - Package field value of IS NOT NULL.
5. Select a core room block record and click the Negotiation Rates - Manager subview tab.
6. In the Negotiation Rates - Manager list, click Calculate Rates.

   Siebel Hospitality updates the fields, as appropriate, from the rates you entered.
7. Select a record and view the information in the fields.

For more information about room block floor negotiation rates in a quote, see *Changing the Floor Negotiation Rates*.

Modifying Arrival Dates in a Quote Meeting Package

You can modify the arrival date for an event quote with one or more associated meeting packages.

This topic is a step in *Process of Managing Meeting Packages in a Quote*.

To modify a meeting package quote arrival date

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for a quote that has one or more associated meeting packages.
3. To modify the arrival date, perform the following steps.
    a. Click Modify Arrival Date.
    b. In the Enter/Change Arrival Date dialog box, enter a new date in the Arrival Date field.

       In the dialog box, the Shift Functions and Shift Room Blocks check boxes are disabled. In other words, you cannot change the arrival dates of individual items. This keeps the meeting package and its associated items in sync.
    c. Click OK.

   Siebel Hospitality calculates the number of days between the former Arrival Date and the new Arrival Date. Siebel Hospitality then applies this number to shift the start dates of all the following associated items equally. The date shift occurs for the following items:
    - Meeting packages

- Functions and function line items
- Nonfunction line items
- Room blocks and room block line items

Siebel Hospitality checks that the new Start Date and End Date fall within the valid effective dates of the meeting package administration record. If the Start Date or the End Date falls outside of the valid date range, Siebel Hospitality does not allow the change to occur.

For more information about modifying the arrival date of a quote, see *Modifying the Event Quote Arrival Date*.

Time Shifting a Quote Meeting Package

You can time-shift an event quote with one or more associated meeting packages.

This topic is a step in *Process of Managing Meeting Packages in a Quote*.

To time shift a meeting package quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for a quote that has one or more associated meeting packages.
3. Click Time Shift.
4. In the Time Shift Events dialog box, perform one of the following steps:
   - Select the Shift by Day check box, and enter a number of days.
     A negative day value shifts the event back, and a positive day value shifts the event forward.
   - Select the Shift by Date check box, and select a new date.
5. Click Shift Event.
   If Shift by Day is selected, then Siebel Hospitality uses the entered number of days. If Shift by Date is selected, then Siebel Hospitality calculates the number of days between the former Arrival Date and the new Arrival Date. Siebel Hospitality then applies this number to equally shift the start dates of all the following associated items:
   - Meeting packages
   - Functions and function line items
   - Nonfunction line items
   - Room blocks and room block line items

   Siebel Hospitality checks that the new Start Date and End Date fall within the valid effective dates of the meeting package administration record. If the Start Date or the End Date falls outside of the valid date range, Siebel Hospitality does not allow the time shift to occur. If the dates are valid and the event shift is successful, then Siebel Hospitality displays the Time Shift view.
6. In the Time Shift view, click the Menu button near the start of the view and choose one of the following menu options:
   - Choose Accept Shifted to accept the event shift.
   - Choose Reject Shifted to discard the event shift.

For more information about time shifting an event quote, see *Event Shifting at the Quote Level*.

About Core and Noncore Field Behaviors in Quotes

Some fields associated with meeting packages and their components have different characteristics depending on whether they are in core or noncore records. These differences in field behaviors are described in the following table.

Field	Core	Noncore
Actual	The value in this field is ignored. This can cause the quantities to become out of sync.	The value of this field is used in combination with the Best Attendance field to calculate the quantity of function line items. For more information about Best Attendance field functionality, see *Package Per Person Field Behaviors*.
Applies To	Read only.	This field is editable and has no default value. If the Package field has a value, then this field is required. If the Package field is null, then this field is not required.
Core	Read only. If this item was added as part of a meeting package associated with the quote (that is, if this is a core item), then this check box is selected.	Read only. If this item was manually added to the quote (that is, if this is a noncore item), then this check box is cleared.
Date	For items with a Posting Rhythm of Per Stay, then by default, this field displays the Arrival Date of the quote and is editable. For items with a Posting Rhythm of Per Day, this field is read only. One item per day is automatically created. Consequently, by default, this field displays the Day # calendar date through the number of days for the event.	By default, this field displays the Arrival Date of the quote and is editable.
Day #	The value of this field is calculated from the Date field of the item and the Arrival Date field of the quote, and is not editable. For example, if the Arrival Date is 1/1/2012, then items on 1/1/2012 will have 1 in the Day # field, items on 1/2/2012 will have 2 in the Day # field, and so on.	By default, this field has a value of 1 and is editable.
Display Name	By default, this field contains the Display Name specified in the meeting package administration record and is editable.	This field has no default value and is editable until the quote becomes read only.
Function Type	This field is read only.	This field is editable.
Guaranteed	The value of this field is ignored. This can cause the quantities to become out of sync.	The value of this field is used in combination with the Best Attendance field to calculate the quantity of function line items. For more information about Best Attendance field functionality, see *Package Per Person Field Behaviors*.

Field	Core	Noncore
Item	Read only. By default, this field displays the Item value (that is, the product) specified in the meeting package administration record.	Editable. Selection options are constrained to products associated with the current property and products that are not associated with any specific property.
Negotiated Price	Read only. By default, this field displays the price of this item on the property price list.	This field is editable and has no default value.
Package	Read only. This field shows the meeting package from which this item was created. By default, this field contains the Display Name specified in the meeting package record in the Quotes screen, Meeting Packages view.	• If this item can be manually associated with a meeting package, then select a meeting package with which to associate the item. Selectable values are constrained to meeting packages associated with the quote. For quotes with no associated meetings packages, the list is blank. • If this item cannot be manually associated with a meeting package, then this field is read-only and null.
Posting Rhythm	Read only.	This field is editable and has no default value. For noncore, non-meeting package items, the value of this field cannot be Per Stay.
Projected	The value of this field is ignored. This can cause the quantities to become out of sync.	The value of this field is used in combination with the Best Attendance field to calculate the quantity of function line items. For more information about Best Attendance field functionality, see *Package Per Person Field Behaviors*.
Qty	Read only. By default, this field displays the attendance figures entered in the quote meeting package record.	This field is editable and has a default value of 1.
Revenue Sub Category	Read only.	Editable.
UoM	Read only. By default, this field displays the value set in the product administration record for the item.	Editable. By default, this field contains the value set in the product administration record for the item.

Workflow for Copy Function Line Items Functionality

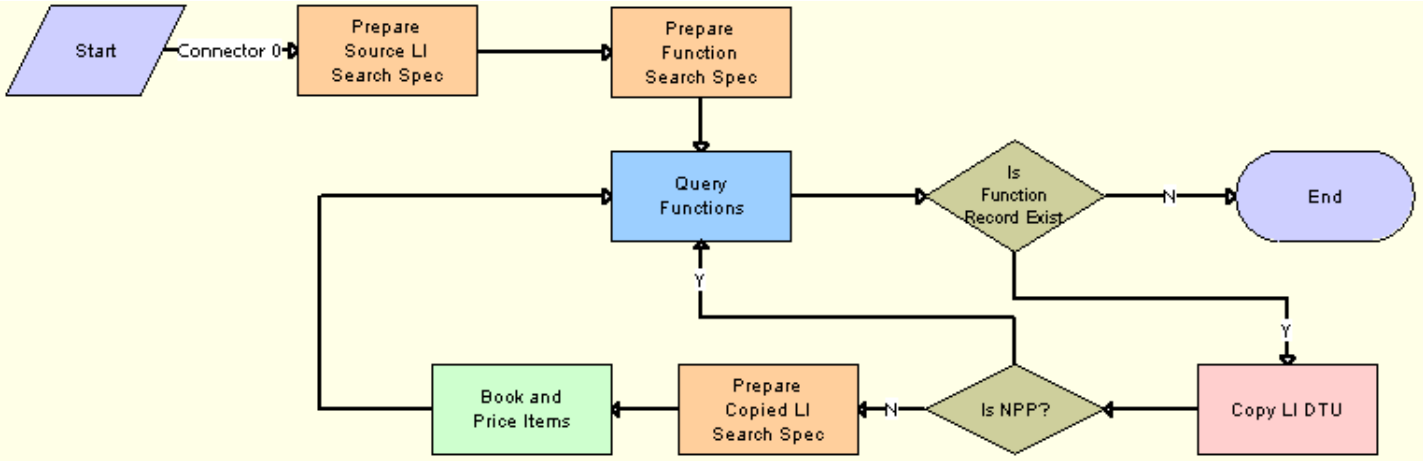
This topic describes the workflows for Copy Function Line Items functionality that are specific to Siebel Hospitality. By modifying these workflows, you can configure Copy Function Line Items functionality according to the business requirements of your company. For more information about workflows, and about customizing workflows, see *Siebel Business Process Framework: Workflow Guide* .

This topic includes the following topic:

- *TNT SHM Copy Line Items Workflow*

TNT SHM Copy Line Items Workflow

This workflow copies a list of selected function line items to the destination functions (target functions). This workflow takes the Row IDs of the selected line items and the Row IDs of the target functions, separated by semicolons (;), as inputs. The following image shows this workflow.



Workflow Description. This workflow performs the following actions:

1. **Prepare Source LI Search Spec**. This step prepares the search specification for the selected line items.
2. **Prepare Function Search Spec**. This step prepares the search specification for the destination or target functions.
3. **Query Functions**. Queries the list of target functions into which the line items are to be copied. The search specification that was prepared in Step 2 is passed as input. The other inputs are the business component name (Function BC) and From First (a literal value). This step also loops through the list of records that were queried.
4. **Is Function Record Exist**. After the list of target functions is queried, if any active rows are returned, this step continues the flow to Step 5. If no records are returned the workflow ends.
5. **Copy LI DTU**. Calls the Data Map to copy the selected line items to the destination functions.
6. **Is NPP?** If the selected list of line items belongs to a non-participating property (NPP), this step copies the line items to the target functions by skipping booking and pricing functionalities.
7. **Prepare Copied LI Search Spec**. Prepares the search specification for the copied line items that calls the booking and pricing functionality.
8. **Book And Price Items**. Calls the booking and pricing functionality for the copied line items.

19 Managing Hospitality Inventory

Managing Hospitality Inventory

This chapter includes information that can be used and procedures that can be performed when working with hospitality inventory. It includes the following topics:

- *Process of Managing Hospitality Event Inventory*
- *About Managing Function Characteristics at the Opportunity Stage*
- *About Managing Room Block Characteristics at the Opportunity Stage*
- *About Managing Property Characteristics at the Opportunity Stage*
- *Overview of Quote Generation*
- *Overview of Function Space Reservation*
- *About Space Holds*
- *About Managing Functions at the Quote Stage*
- *Managing Functions That Require Backup Space*
- *Managing Room Blocks at the Quote Stage*
- *Background Processes at the Quote Level*
- *Changing Inventory-Critical Reservation Attributes*
- *Time Shifting Event Quotes and Event Quote Items*
- *About Run of House Room Types*
- *About Inventory Availability for Run of House Rooms*
- *Checking Inventory Availability*
- *Actualizing a Function*

Process of Managing Hospitality Event Inventory

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

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

- *About Managing Functions at the Quote Stage*
- *Managing Functions That Require Backup Space*
- *Managing Room Blocks at the Quote Stage*
- *Managing Functions That Require Backup Space*
- *Changing Inventory-Critical Reservation Attributes*
- *Actualizing a Function*
- *Time Shifting Event Quotes and Event Quote Items*

- *Checking Inventory Availability*

About Managing Function Characteristics at the Opportunity Stage

The sales representative can use a number of function parameters to manage and detail functions at the opportunity level. Management at the opportunity level typically occurs before the sales representative associates properties with the opportunity and generates quotes. Some controls and parameters that can be used to manage opportunity functions are as follows:

- **Noise flag.** The Noise flag indicates that a function might generate noise which can inconvenience other guests at the property. The noise flag helps sales representatives identify noise-producing functions and manage other functions that occur during the same time.
- **Spacious Set flag.** At the opportunity stage, the user can create a new function (or edit an existing function), specify the setup style and expected number of attendees, and then set the Spacious Set flag. During the create quote process, the Best Fit step takes the Spacious Set flag into account when reserving a function space. See *Flagging a Function for a Spacious Setting* for more information.
- **Bypass flag.** The Bypass flag allows the sales representative to bypass the best-fit step of the create quote process for functions requiring very specific locations. Instead, the sales representative can select the function space at the quote stage.
- **Best Fit Suite Only flag.** The Best Fit Suite Only flag is used to book suites as function spaces. The sales representative sets the Best Fit Suite Only flag so that only suite function spaces are selected during the create quote best fit process.
- **Feature drop-down list.** The Feature drop-down list is used to specify particular product features, which the create quote best fit process must take into account when selecting the most appropriate function space for the booking. See *Setting Up Function Space Product Features* for more information.

Subfunctions at the Opportunity Stage

The sales representative can build a hierarchy of functions and subfunctions at the opportunity level. For example, a board meeting function takes place for the entire business day in which smaller breakout sessions are held, such as a coffee break and dinner. These breakout sessions, which occur throughout the board meeting, are defined as subfunctions under the Board Meeting Function record. See *Detailing a Function* for more information.

About Managing Room Block Characteristics at the Opportunity Stage

During the opportunity capture process, the sales representative can add detailed information about room blocks and room block line items. Room block line items represent the sleeping room types that are booked as part of a room block. One of the attributes that characterizes the room block line item is the room block type. The user can select only generic sleeping rooms at the opportunity stage. The administrator creates the generic sleeping room line items using the Product Administration screen. There are several types listed under the Room Type field, including:

- Generic Standard

- Generic Deluxe
- Generic Suite
- Generic Upgrade

During the create quote process, Siebel Hospitality maps the generic room type to the property's sleeping room. This mapping process uses generic room block records, and each generic room block record has a list of actual property sleeping rooms associated with it. For more information about creating generic room block records, see *Creating Generic Room Blocks* and *Adding Room Block Information to an Event Opportunity*.

About Managing Property Characteristics at the Opportunity Stage

There are several property attributes that affect how the quote records are handled during the generate quote process. Two such attributes are the NPP flag (Non Participating Property flag) and the Bypass flag. When either of these two attributes flags set for property records, Siebel Hospitality skips the best fit and pricing steps during the create quote process.

Nonparticipating properties are identified as properties that do not use the Hospitality Event Sales, Execution or Function Space Inventory processes. The function spaces and sleeping rooms in nonparticipating properties, however, can still be sold by a member of the Brand and National Sales Center.

Similar to the function's Bypass flag attribute, the Bypass flag that is set in the Opportunity Property record indicates that the best fit step is suppressed for all functions records associated with that property record. After the quote is generated, the sales representative can manually assign specific function spaces to the functions of the quote. For more information about associating property records with an opportunity, see *Selecting Properties for an Event Opportunity*.

Overview of Quote Generation

When function, room block, and property information is captured at the opportunity level, an automated process is triggered to generate quote records for each property associated with the opportunity record. The Generate Quote process takes many factors into account when generating quote records that meet all the specified requirements.

The Generate Quote process calls the following inventory and pricing subprocesses:

- Function Space and Suite Best Fit Reservation
- Sleeping Room Reservation
- Mapping generic products to property specific products
- Calculating the room rental price of function space
- Calculating the quote threshold value

The application uses attributes such as the Bypass and Non Participating Property flags to determine which subprocesses are started for the agenda created during the opportunity capture stage. For example, the Bypass flag set on the property record suppresses several subprocesses including function space reservation.

It is critical that the sales representative validates each attribute on the Function, Room Block, and Property records. These attributes dictate which automated subprocesses are started during the generate quote process.

Overview of Function Space Reservation

The function space reservation process uses a combination of attributes to select and reserve a function space. During the sales and event execution processes, users call methods to check for function space availability. During the availability checks, Siebel Hospitality determines if the function space can be reserved by examining the existing reservations, effectivity dates, predefined authorization levels, and function space configurations for the time and space requested.

When the user changes certain attributes (for example the start time) that can affect the inventory, Siebel Hospitality prompts the user to verify that the function space is available with the changed attributes. For more information, see *About Inventory-Critical Fields at the Function Level*.

About Space Holds

A *space hold* is a temporary or permanent hold placed on a function space to reserve it for an event during a future time period. When a space hold is temporary, the function is referred to as being *detailed*. For more information about detailing, see *About Function Detailing*.

Typically, when a space hold is applied, the space must be held regardless of whether or not it is used. The length of time during which a space hold is active is usually, but not always, 24 hours.

For example, a customer wants to use Salon A from 9:00 a.m. to 5:00 p.m. for two days. The customer plans to bring multiple items of complex equipment into Salon A. This equipment would take a long time to remove and set up again. To accommodate the customer, the hotel creates a space hold on Salon A for the time between 5:00 p.m. and 9:00 a.m., so that the room cannot be booked by any other customer during those time spans.

When booking an event, a customer does not always know the complete function agenda for that event. In such a case, the customer wants to reserve space now and decide later how to divide the reserved space and time to meet the function agenda. Siebel Hospitality supports space hold functionality that allows you to book space to hold it for a future event. To activate a space hold, you create a space hold record that is, in effect, a virtual function.

For example, a property might hold all the meeting space at a hotel for a customer for three days. During those days, the customer plans to hold functions using some, but not necessarily all, of the space for most, but not all, of the time. While the space hold is active, all the meeting space at the hotel for the entire three days, including the time periods and spaces that might not be used, is reserved for the customer and unavailable to others.

The Siebel Hospitality functionalities that support space holds are as follows:

- Create a space hold, that is, block out a set of function spaces that might range from all the function spaces in the hotel to a smaller set of function spaces. Held spaces can be individual spaces or configured spaces.
- Keep the space hold active for up to 24 hours.
- Schedule functions and subfunctions for an event in the held spaces.
- Either release the space hold or keep the space hold in place.
- Create event orders and banquet event orders (BEOs), and display the revenue correctly at a function level whether or not a space hold is active.
- Display blocked space and function bookings for a space hold in the Function Space Diary.
- Remove a space hold by detailing out the functions.

The process of dividing a function into many smaller functions is called *detailing*. For more information about detailing, see *Detailing a Function*.

Users can apply a space hold to any space that is set up in the Siebel Hospitality inventory as a function space. The space might be a specific space or a configured space. For example, if a user wants to apply a space hold to the function spaces on the first floor of a hotel, then a configured function space that corresponds to the first floor of the hotel, made up of the indivisible function spaces on that floor, must exist in inventory.

Space hold bookings follow the availability rules for function spaces that are set up in your Siebel application. In other words, booking a space hold is the same as booking a non-space hold from an availability standpoint.

For more information about setting up function spaces and availability rules in inventory, see *Defining Function Space Inventory Controls*.

Scenario for Managing a Space Hold

This topic gives one example of how a space hold might be used. You might use the space hold functionality differently, depending on your business model.

A corporate client contacts a hotel sales representative with a request to book all the function spaces and sleeping rooms in a hotel during a specified week for an annual conference.

The sales representative creates an opportunity and fills out the opportunity details including the property that the customer wants to reserve. The sales representative then generates a quote for that property and secures the inventory. To secure the function space (which in this case comprises the entire hotel), the sales representative creates a function space hold record and selects a configured space that represents the whole hotel. The sales representative then reserves this space.

After securing the space, the sales representative obtains specific event details from the client, including the functions and subfunctions that might be held during the event. The sales representative enters the event details, creating functions and subfunctions within the space hold.

At this time, all the space in the hotel is reserved by the space hold. To see what spaces are actually used and not used, the sales representative goes into the Function Space Diary. The diary displays what spaces are reserved by the space hold, and which of those spaces have functions planned in them. The diary also displays any conflicts, such as functions in the same space, overlapping functions, or empty time slots.

The corporate client insists on excluding other groups from the hotel during the conference, so that all the space in the hotel remains blocked for use by the corporate client. The sales representative therefore decides to keep the space hold active so that Siebel Hospitality continues to show all the space in the hotel as booked.

Subsequently, the sales representative follows the standard group sales process to complete the event booking and conduct the event. The sales representative might then turn this event over to an event manager at the property. The event manager reviews the details of the event and continues to work with the corporate client to fine-tune the details. During this time, the space hold remains in place so that Siebel Hospitality continues to show all the space in the hotel as booked.

About Managing Functions at the Quote Stage

The sales representative can manage function details for a quote using the Quotes screen, Function view and Line Items view, or by navigating to the Functions screen and querying for the function in the Functions list.

In addition to updating function field information, the user can perform a number of tasks from these screens and views by using the following functionality:

- **Reserve and Next Fit.** For more information, see *Hold Function Space with Reserve and Next Fit*.
- **Option.** For more information, see *Optioning Function Space*.
- **Overbook.** For more information, see *Overbooking Function Space*.
- **Cancel.** For more information, see *Canceling a Function*.
- **Copy.** For more information, see *Copying a Function*.
- **Assign.** For more information, see *Assigning a Function to a Specific Space*.
- **Detail.** For more information, see *Detailing a Function*.
- **Reprice and Reprice All.** For more information, see *Function Line Item and Revenue Data Repricing*.
- **Refresh.** For more information, see *Function Line Item and Revenue Data Repricing*.

Hold Function Space with Reserve and Next Fit

The sales manager can use the Reserve button on the Quote Function view to reserve a specific space or category. The manager uses the Next Fit button to find available function space that meets the event requirements.

Reserve Button Functionality

The Reserve button is typically used under the following conditions:

- If availability checks for the function were bypassed at the opportunity stage, the user updates the availability information in Quote screen, Functions view. This update includes any changes to information about the function space, setup style, expected number of attendees, date, start time, and duration of the event. The user then clicks Reserve to hold the function space, if available.
- If the user adds a new function to the quote, selects a function space, and completes the rest of the fields for the function record. The user then clicks Reserve, and the specific space, if available, is reserved.
- If the user wants to change the function space category or specific space, the user can select a different function space and then click Reserve to start the availability check for the new function space.
- If a quote has been generated from a nonparticipating property, this button initially changes the value in the Inventory Status field from a null value to Reserved. The user can then use the button to switch between Reserved and Unreserved as information is supplied from the NPP.

Next Fit Button Functionality

When the Next Fit button is clicked, the best available function space is selected, and the inventory status is set to Reserved. The function space selection is based on the number of attendees, the setup style, any specified features, and the physical area specified in the function record.

For example, after an opportunity is created and a quote generated, the user reviews the function space availability in the Quote screen, Function view. At this point, the user clicks Next Fit to start the process of finding and reserving the best available function space.

> **Note:** Users can only click the Next Fit button if a function space has not already been selected and reserved for the function.

In some circumstances, the Next Fit process might not locate any available spaces. In this case, Siebel Hospitality returns the best-fit function space with a status of Unreserved.

Note: The user cannot use the Next Fit option when managing NPPs.

Optioning Function Space

When the authorization level value for the function space is reached, the user can maintain an option on the function space in case a cancellation occurs. The *authorization level* is an inventory control for the function space, which allows the administrator to specify a value for the number of times the function space can be booked. This value is usually set higher or equal to the capacity level. For more information about defining authorization levels, see *Setting Up Inventory Controls*.

The function space can be optioned as many times as allowed by the option limit. The option limit is entered as part of the inventory control setup. You cannot option function space when managing NPPs.

The Option button can only be used when the inventory status is unreserved, or when no status appears for the inventory. During the process of optioning function space, users can select multiple functions and click the Option button. Each time Option is used, a new availability check is started.

If the function space is available because of a cancellation, then the function space is reserved. If the function space is not available, then the inventory status is set to Optioned.

If the function space becomes available, then the following actions occur:

1. The optioned function holds the function space.
2. An email is generated and sent to the owner of the quote. The quote owner with the option must reserve the function space within three hours.

   Note: The time stipulation can be configured using the TNT SHM Optioned Booking Expiry workflow. When the time has been changed, the workflow must then be redeployed. See *Activating Hospitality Workflows* for more information.

3. The inventory status changes from Optioned to Option Reserved.
4. If the sales representative does not respond within the stipulated time, then the Option Reserved inventory status changes to Unreserved.

   When the inventory status changes to Option Reserved and the function space selected is a specific space, the sales representative can choose to accept the option. To accept the option, click the menu button in the Function Space list, and select Accept Option button. The inventory status changes to Reserved.

Overbooking Function Space

If the function space authorization level has been reached, the user can choose to overbook the function space, overriding the authorization level. The function space can be overbooked as many times as allowed by the overbook limit. The overbook limit is entered as part of the inventory control setup.

If the function space is available because of a cancellation, then the function space is reserved. However, if the function space is still not available, then the inventory status is changed to Overbooked. A new availability check is started each time the user clicks Overbook. If the function space becomes available, then the overbooked function automatically becomes reserved. If an optioned and overbooked function exists and function space become available, the overbooked function receives first priority.

Canceling a Function

If plans change and an event no longer includes a particular function, an event manager can cancel the function using the Function screen, More Info view or from the Quotes screen, Functions list.

Canceling the function automatically releases single asset bookings for the function, critical and noncritical assets, as well as other inventory such as the function spaces. If an asset is double-booked, the second request for the asset remains in the Siebel Hospitality database, but does not automatically convert to a regular booking. The record for a canceled function remains in the Siebel Hospitality database along with the function line items. However, the function is not included on a Schedule of Events (SOE), and the function line items do not appear on an invoice.

The Cancel Function option cancels both parent functions and subfunctions. It also cancels both primary and backup function spaces.

To cancel a function

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Quote Name field.
4. In the Functions list, select the required function, click the menu button, and then click Cancel Function.

   The function status is changed to Cancel and the inventory associated with the function is released.
5. Enter the reason for the function cancellation, and save the record.

Processing Backup Spaces with the Inventory Buttons

The inventory buttons on the Quotes screen, List, Functions, Function Space view (Reserve, Option, Overbook, and Next Fit) can be used on backup and active spaces. However, these inventory buttons on the Quotes screen, List, Functions view apply only to primary active spaces.

The Reprice and Reprice-all buttons take backup spaces into account when calculating revenue totals.

Users can use inventory buttons on backup function space only if the primary function space for the function has been either reserved, overbooked, or optioned. This is because there is no point in holding backup space if the primary space has not been held for use.

Releasing function space inventory for the primary space after switching to a backup space has no effect on the inventory for reserved, optioned, or overbooked backup space.

Copying a Function

The user can copy a function from the Quote Functions and the Functions More Info view. When a function is copied, the user can specify the function details to copy, such as number of days, number of copies per day, and whether to copy subfunctions.

Users can also copy a function to quotes with the same property and quotes with a different property. If a user copies a function to a quote with a different property, the best fit process is started to find a function space.

When a user copies a function to a quote with a different property, the function line items are initially mapped to the generic product. A property-specific product is then selected from the new property. If there is no such product, the generic line item is copied. If no mapping between the original line item and the generic line item can be performed, the line item is not copied.

Also, when users copy a function with line items and change the date, Siebel Hospitality verifies whether the item is still available by checking catalog visibility. If the item is not available, it is not copied.

To copy a function

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required opportunity record.
3. In the Quote record, click the link in the Name field.
4. In the Functions list, select the required function and click Copy.
5. In the Copy Function form, complete the fields, and then click Copy.
   The following table describes some of the fields.

Field	Comments
Quote #	The number of the quote with which the function is associated.
Order	The order with which the function is associated (if any).
Date	The date on which the function is due to be held.
# of Days	The number of days for which this function is copied. For example, if you enter 2 to this field, a copy of the function is made for the date specified in the Date field, and a copy is made for the date following the date specified in the Date field.
Start Time	The time at which this function is due to commence.
Duration	The duration in minutes of this function.
Day #	The day number of the function.
# of Copies/Day	Specify the number of copies of the function to be made each day. For example, if you enter 2 to this field, copies of the function are made for every day specified in the # of Days field.
Subfunctions	If you select this field, all subfunctions associated with this function are copied to the new function or functions.
Line Items	If you select this field, all line items associated with this function are copied to the new function or functions.

Field	Comments
Backup Spaces	If you select this field, all backup spaces associated with this function are copied to the new function or functions. For more information about backup space, see *Managing Functions That Require Backup Space*.

About Function Status Values

The status of a quote and the function associated with the quote changes throughout the sales cycle. The quote and function statuses are defined by the administrator and affect inventory business logic. The following table describes quote and function status values, and the corresponding Inventory states.

Status	Description	Inventory State
Prospect	Represents an initial inquiry by a customer (opportunity). Inventory might or might not be protected depending on whether a reservation request has been initiated.	Potentially holding
Hold	Represents a quote that has secured inventory for a short period of time.	Holding
T2 (Tentative 2)	Represents a quote that has secured inventory. This state is initiated by user action. A verbal Definite has been granted, but a contract has not been sent to the client.	Holding
T1 (Tentative 1)	Represents a quote that has secured inventory. This state is initiated by user action. A verbal Definite has been granted, and a contract has been sent. The sales representative is awaiting the signed contract.	Holding
Definite	Represents customer acceptance by means of a signed contract.	Holding
Lost/Turned Down	Represents a quote that is rejected. Inventory is not held.	Cannot hold inventory
Cancel	Represents a quote that has been declined after initial customer acceptance. Inventory becomes available for sale.	Cannot hold inventory
Actual	Represents an event that has been executed and inventory used. Only functions that have already taken place have this status. The booking remains in the Siebel Hospitality database as an actual booking.	Holding

Assigning a Function to a Specific Space

Users can assign a function to a specific space using the Quotes screen, List, Functions, Function Space view. When the function is being assigned to a specific space, Siebel Hospitality checks any values that are entered for Feature, Suite, Room Area, Setup Style, and Expected Attendees. The specific space within the selected category, which meets the requirements, is selected for the function.

To assign a function to a specific space

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Functions list, query for the function record.
5. Click the Function Space view tab.
6. Create or select a function space record, choosing a category as the function space value.
7. Reserve the function space by clicking the Reserve button.

   > **Note:** If you do not reserve the function space, the Assign Specific Space option on the menu button remains unavailable.

8. Click the menu button, and select Assign Specific Space.
   - If a specific space that meets all the requirements is available, the category value changes to a specific space for the booking. The specific space selected will be one of the spaces belonging to the category.
   - If no such specific space is currently available, the following message appears, and the function remains assigned to a category:

     No specific space is available for assignment. This might be because of invalid function space/setup style combination, invalid function space/feature combination, authorization beyond capacity or function space effective dates.

About Function Detailing

Customers often block a large, configurable function space in which multiple, smaller breakout sessions are held. When the space is initially blocked, the detailed agenda of the breakout sessions is typically not known, and the space is blocked with a high-level agenda consisting of large contiguous blocks of time. This process is known as a *space hold*. For more information about space holds, see *About Space Holds*.

As the event date approaches, sales representatives or event managers *detail* the function by creating subagendas in smaller time increments for the breakout sessions (within the start and end dates of the original function), and assigning breakout sessions to portions of the larger function space that is already blocked.

A user can book detailed subagendas into a space that is already held without double-booking the inventory by creating subfunctions for a function. A function that has associated subfunctions is known as a *parent function*. A user can also create subfunctions of a subfunction, known as *child subfunctions*. However, users cannot select a function space for a child subfunction.

In the case of a space hold, the parent function is a space hold record. The subfunctions associated with the space hold record represent the functions for the space hold. These subfunctions must use space that is part of the space hold and

take place within the time frame of the space hold. These subfunctions can also have another level of child subfunctions (grandchildren of the space hold) that represent the subfunctions for the space hold. The child subfunctions do not hold space and can take place at any time.

When the detailing is complete, a user can detail out the parent function. All subfunctions become functions, all child functions become subfunctions, and the parent function is deleted.

Characteristics and Constraints of Detailing and Space Holds

This topic describes characteristics and constraints for detailing and space holds, as they apply to parent functions, subfunctions, and child subfunctions.

Parent functions. In parent function records, the following characteristics and constraints apply:

- Undetailed functions can have only two levels of hierarchy: function and subfunction. However, detailed functions can have three levels of hierarchy: function, subfunction, and child subfunction.
- If you select the Detail flag on a function and reserve it, you cannot clear the Detail flag until the function is released.
- You cannot change the primary function space for a function that is detailed and reserved, while the Next Fit, Option, and Overbook buttons are disabled.

Subfunctions. In subfunction records, the following characteristics and constraints apply:

- You can detail both category space functions and specific space functions.
- If you select a category as the Function Space value for a parent function, you cannot select and reserve a function space for a subfunction. However, if you select a specific space for the parent function, you can select an associated function space for a subfunction.

  For example, if you select Salon AB as the function space for a detailed parent function, you must select either Salon A or Salon B for the subfunction.
- In a subfunction record, the Function Space field lists only those function spaces included in the parent function space for selection.
- You can reserve function spaces for subfunctions if the primary function space for the parent function is reserved. If the primary function space for a parent function is released, all the function spaces for the subfunctions are also released.
- The date and time of a subfunction are constrained by the date and time of the parent function. A subfunction must have the same date as its parent function, and the start and end times of the subfunction must be within the start and end times of the parent function.
- If a function becomes a subfunction, the subfunction loses previously held inventory.

Child subfunctions. In child subfunction records, the following constraint applies:

- The Detail check box in the parent function must be selected for you to be able to create a child function for a subfunction. If the Detail check box is cleared in the parent function, when you select a subfunction, the Create Sub Function button and the Indent to child button are disabled.

Detailing a Function

The procedures in this topic describe how to create and manage detailed functions and their subfunctions and child functions. This topic includes the following topics:

- *Creating a Parent Space Hold Function*

- *Creating Subfunctions with the Function Hierarchy Buttons*
- *Creating Subfunctions with the Sub Function Button*
- *Completing the Detailing of a Function*

This task is a step in *Process of Managing Hospitality Event Inventory*.

Creating a Parent Space Hold Function

To create a parent space hold function record, follow these steps.

To create a parent space hold function

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record for which to create a parent space hold function.
3. In the quote record, click the link in the Name field.
4. Click the Functions view tab.
5. In the Functions list, add a record, and complete the fields as described in the following steps.

    a. In the Function Type field, select any function type.
    b. In the Function Space field, select a function space.

    You can select a specific space or a configured space.
    c. Complete the other fields as needed.

    For more information about creating a function for a quote, see *Adding Functions and Function Line Items to a Quote*. For more information about assigning a function to a function space, see *Assigning a Function to a Specific Space*.
6. Reserve the space by clicking the Reserve button.

    The Availability Engine checks for inventory availability according to the availability rules defined in the Property Pricing Admin screen, Inventory Control view. If the space is available, the function record will acquire an inventory status of Reserved.
7. When you are ready to detail the function, select the Detail check box.

    After you select the Detail check box, the Primary, Start, End, and Function Space fields become read only.

    > **Note:** The Detail check box is enabled for parent functions only. You cannot select this check box in subfunction records.

8. Release the reserved inventory by selecting a function clicking the Release button.

    The Release button enables you to release function space inventory after it has been reserved. When you click the Release button, the inventory status of the current function space changes to Unreserved from the previous value. If the function is a parent function (in other words, a detail function or a space hold function), then the inventory of any subfunctions is also released.

Creating Subfunctions with the Function Hierarchy Buttons

A user can create and manage subfunctions and child subfunctions for a function with the function hierarchy buttons. These buttons enable you to indent and unindent functions to create a hierarchy, and to move functions up and down the list. The function hierarchy buttons are described in the following table.

Button	Description	Comments
	Forward arrow button	**Demote one level**. Demotes the function by one level in the detailed function hierarchy.
	Back arrow button	**Promote one level**. Promotes the function by one level in the detailed function hierarchy.
	Up arrow button	**Move up**. Moves the function up the function list.
	Down arrow button	**Move down**. Moves the function down the function list.

The following steps assume that a function with the Detail flag selected already exists in the Quote Functions list. Although detailing is typically done at the quote level, you can also create a hierarchy of functions in an opportunity and select the Detail flag at that stage.

To create subfunctions with the function hierarchy buttons, follow these steps.

To create a subfunction with the function hierarchy buttons

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record that includes the detail function for which to create subfunctions.
3. In the Quote record, click the link in the Name field.
4. In the Quote Functions list, verify that a function record exists with the Detail check box selected and an Inventory Status of Reserved.
5. In the Functions list, add another record, and complete the fields.
6. Use the Move up and Move down buttons to position the record after the detail function.
7. Click the Demote one level button to make the new function a subfunction of the parent detail function.
8. In the Function Space field, select a function space for the subfunction.

   You can associate function space for subfunction only if the parent function is detailed.

   - If you have selected a specific space for the parent function, you can also reserve a specific space for the subfunction. Only spaces related to the parent function space are available for selection.
   - If you have selected a category for the parent function, you cannot reserve a specific space for the subfunction.
9. Click Reserve.

To create child subfunctions with the function hierarchy buttons, follow these steps.

To create a child subfunction with the function hierarchy buttons

1. In the Functions list, add a record and complete the fields.
2. Use the Move up and Move down buttons to position the new record after a previously created subfunction.

3. Make sure the Detail check box in the parent function is selected.

   The function hierarchy buttons are available for a subfunction only if the parent function is detailed (that is, if the Detail check box of the parent function record is selected). If the Detail check box of the parent function is cleared, the function hierarchy buttons are disabled for the subfunctions of that parent function as well.
4. Click the Demote one level button twice to make the record a child subfunction of the first subfunction record created.

   Note: You cannot reserve a function space for a child subfunction.

Creating Subfunctions with the Sub Function Button

A user can create and manage subfunctions and child subfunctions for a function with the Sub Function button. The Sub Function button calls a dialog box in which you can enter multiple subfunctions. You can also delete or modify the existing subfunctions in the dialog box. This dialog box eliminates the need to manually indent subfunctions, because they will already be associated with the correct parent record as subfunctions.

The ability to create and modify subfunctions with the Sub Function button varies according to the current selection. The Sub Function button is enabled only if the current selection is a parent function or a subfunction of a detailed parent function. If you are not able to modify a function, then you cannot modify the subfunctions of that function. If you are not able to create new functions, then you cannot create new subfunctions.

The following steps assume that a function with the Detail flag selected already exists in the Quote Functions list. Although detailing is typically done at the quote level, you can also create a hierarchy of functions in an opportunity and select the Detail flag at that stage.

To create subfunctions with the Sub Function button, follow these steps.

To create a subfunction with the Sub Function button

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record that includes the function for which to create subfunctions.
3. In the Quote record, click the link in the Name field.
4. In the Quote Functions list, select a function for which to create subfunctions.
5. Verify that the function record has the Detail flag selected and an Inventory Status value of Reserved.
6. Click Sub Function.

   The Create Agenda Sub Function dialog box appears.
7. In the Create Agenda Sub Function list, add a subfunction record and complete the fields.

   Some fields are described in the following table.

Field	Comments
Day #	The day number of the subfunction. By default, displays the day number value from the parent function.
Date	The date of the subfunction. By default, displays the subfunction date value from the parent function.
Day	Automatically calculated from the date of the parent function. Read only.

Field	Comments
Function Name	The name of the subfunction.
Function Type	The type of subfunction that is planned.
Start Time	The start time of the subfunction. Does not have to be within the start and end times of the parent function, except if the parent function is detailed.
End Time	The end time of the subfunction. Does not have to be within the start and end times of the parent function, except if the parent function is detailed.
Expected	The number of attendees the customer expects to attend the subfunction.
Projected	The number of attendees the sales representative expects to attend the subfunction. This value is used when projecting revenue.
Location	Describes where the subfunction will take place.
Flow	Indicates to the property operations staff whether the attendees are expected to arrive in a flow (selected) or all at once (cleared).
Function Space	Select a function space for this subfunction. Displays a list of function spaces that are used for detailing. This field is editable only when the parent function has a function space specified and the Detail flag selected. Otherwise, this field is read only.

8. Repeat the preceding step for each additional subfunction to associate with the current parent function.

   You can enter subfunctions in any order.
9. Click OK.

   Siebel Hospitality redisplays the Function List with the new subfunctions indented after the parent function. The new subfunctions are sorted by start time in ascending order.

> **Note:** If you select the parent function and click Sub Function again, the Create Sub Function pop-up window also displays the associated subfunctions sorted by start time in ascending order.

To create child subfunctions with the Sub Function button, follow these steps.

To create a child subfunction with the Sub Function button

1. In the Functions list, select a subfunction for which to create child subfunctions.
2. Make sure the Detail check box in the parent function is selected.

The Sub Function button is available for a subfunction only if the parent function is detailed (that is, if the Detail check box of the parent function is selected). If the Detail check box of the parent function is cleared, the Sub Function button is disabled for the subfunctions of that parent function as well.

3. Click Sub Function.

   The Create Sub Function pop-up window appears.
4. In the Create Sub Function list, create a subfunction record, complete the fields, and click OK.

   Siebel Hospitality redisplays the Functions list with the new child subfunctions indented one level after the parent subfunction and two levels after the parent function.

   Note: You cannot reserve a function space for a child subfunction.

Completing the Detailing of a Function

Detailing out a function removes the parent function record, promotes the associated subfunctions to high-level functions, and promotes the child subfunctions to subfunctions. If the parent function is a space hold record, detailing out removes the space hold.

To complete the detailing of a function by detailing out the parent function, follow this procedure.

To complete the detailing of a function

1. In the Functions list, select the parent function.
2. Click the Menu button and choose Detail Out/Remove Space Hold.

   The parent function is deleted, and the subfunctions are promoted to functions along with the spaces in which they are booked. The child subfunctions are promoted to subfunctions. Any space that was part of the larger space hold, and that is not used by the subfunctions, is released and becomes available again.
3. (Optional) After the parent function and associated subfunctions are reserved, you can click the link in the Date field of the function record to navigate to the Function Space Diary.

   In the diary, only the parent function is displayed. After the user details out the parent function, however, the subfunctions become functions and are displayed in the diary. The parent function is no longer displayed. For more information about the Function Space Diary display, see *About the Function Space Diary*.

Booking Suites for Functions

The sales user can book a suite for a function using the Quote Functions view by selecting the Best Fit Suite Only flag in the function record and then clicking Next Fit to only return specific spaces of type suite or suite category.

The user can also select a specific space suite or a suite category by clicking the single select button in the Function Space field of the function record and then clicking Reserve.

As with other specific spaces, the user can option suite-specific space by clicking Option, and Overbook the suite space by clicking the menu button and choosing Overbook.

After booking a suite, the user can click the link in the Date field of the function record to navigate to the Function Space Diary.

About Inconsistent Setup Styles and Function Space

When working with quote functions, the user might select an inconsistent setup style and function space combination. This inconsistency typically occurs when a setup style has not been created for the selected function space.

When the user attempts to save the combination, a message appears alerting the user that the combination of function space and setup style are inconsistent, and the record is not saved.

About Unit of Measure Conversions for Function Space Area

Using the Quote Functions view, the user can create a function and enter the area information in either square feet or square meters. If the user enters a value in either the Room Area (Sq. Ft.) field or the Room Area (Sq. M.), the value for the other field is automatically calculated. This conversion is also performed on the Opportunity screen, Function Agenda view.

Flagging a Function for a Spacious Setting

A customer might request a larger space for the function than is typically allocated for the number of expected attendees. For example, a customer might want to hold a function that includes a dance. The expected number of people for the function might suggest a smaller room be booked; however, if a dance is planned, a more spacious function set is required.

This requirement can be met by setting the spacious set flag at the following levels:

- Opportunity stage
- Quote stage

At the quote stage, the user can create a new function (or modify an existing function), specify the Setup Style, remove the room area requirements and the value in the Function Space field, select the Spacious Set flag, and then click Next Fit.

When the Next Fit process is started with the Spacious Set requirement, Siebel Hospitality multiplies the expected number of attendees by 1.5. The resulting number is then used in the Best Fit/Next Fit algorithm. See *Next Fit Button Functionality* for more information about the Next Fit process. The value for Spacious Set can be configured, and is only applicable for an availability check. Changes to this flag after function inventory is reserved have no effect.

Configuring the Spacious Set Flag Multiplier

You can configure the multiplier that is used for the Spacious Set flag. Perform the steps in the following procedure to adjust the multiplier value.

To configure the Spacious Set flag multiplier

1. Log in to Siebel Tools as an administrator.
2. In the Object Explorer, navigate to Business Component.
3. Query for the TNT SHM Function.
4. From the Tools menu, choose Tools, Business Component, and then the Business Component User Prop menu item.

5. Query for the Spacious Set Multiplier.
6. Under Value, enter the new multiplier value.
7. Recompile the SRF.
8. Restart the client.

Managing Functions That Require Backup Space

There are two ways in which function spaces can be mapped to different functions:

- **Using the Best Fit/Next Fit process.** The Best Fit/Next Fit process is performed on the basis of information captured during the opportunity stage and a function space is automatically selected. For more information about Best Fit, see *About Property-Specific Quotes*.
- **Manually adding a new function space.** You can manually add a new function space to the quote if necessary. For more information about manually adding function spaces, see *Adding Functions and Function Line Items to a Quote*.

When you add a new function space to a quote, you must determine whether or not it requires backup space. This is determined by examining the read-only Back Up Required field for the function or function space. If this flag is checked, add extra backup spaces as required.

> **Note:** You cannot delete the Active Primary space for a function. If you want to remove the active primary space for a function, you must make another space the active primary space, and then delete the space that is no longer the active primary space.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To manage functions that require backup, you must do the following:

- *Identifying Function Spaces That Require Backup Spaces*
- *Adding and Reserving Backup Function Spaces*
- *About Booking Types for Function Spaces*
- *Switching a Function to the Backup Space*

Identifying Function Spaces That Require Backup Spaces

The following procedure describes how to identify function spaces that require backup spaces following automatic addition by the Best Fit process. For more information about Best Fit, see *About Property-Specific Quotes*.

This task is a step in *Managing Functions That Require Backup Space*.

To identify automatically added function spaces that require backup spaces

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the quote record, click the link in the Name field.
4. In the Functions list, select the function.
5. Examine the read-only Back Up Required field.
   If this field is checked, then the function space associated with this function requires a backup space.
6. Scroll down, and click the Function Space view tab.

7. Examine the Back Up Required field for the function space.
   This field is automatically selected if the Back Up Required field is selected for the function.

The following procedure describes how to identify function spaces that require backup spaces after you have manually added the function space as line items to a function. For more information about manually adding function line items, see *Adding Functions and Function Line Items to a Quote*.

To identify manually added function spaces that require backup spaces

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the quote record, click the link in the Name field.
4. In the Functions list, select the function.
5. Scroll down, and click the Function Space view tab.
6. Examine the Back Up Required field for the function space.
   If this field is checked, then the function space requires a backup space.

Adding and Reserving Backup Function Spaces

When you have identified a function space that requires a backup, you can add an extra space to the function, and reserve it for use for the particular function. You can add as many backup spaces as you want for a function space that requires backup space. This capability can provide the customer with a greater amount of choice if it is not possible to hold the function in the space that requires backup space.

You cannot reserve a backup space for a function unless one of the active spaces for the function has been reserved. Also, if you unreserve all active spaces, all backup spaces also become unreserved.

This task is a step in *Managing Functions That Require Backup Space*.

To add and reserve a backup function space

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. In the quote record, click the link in the Name field.
4. In the Functions list, select the function.
5. Scroll down, and click the Function Space view tab.
6. In the Function Spaces list, create a new record, complete the fields, and then save the record.
   The following table describes some of the fields.

Field	Comments
Primary	Indicates whether or not this space is the primary space for the function. This field is used if a number of function spaces of booking type Active have been added for the quote. The primary function space appears in the Function Space field of the function. Do not select this field for a backup space.
Function Space	Select a function space to add as backup to the primary function space.

Field	Comments
	Note: Before selecting a function space, it is recommended that you set the Booking Type field to Backup. This precaution prevents any function spaces that require backup from being displayed in the selection dialog box.
Back Up Required	Read only. Indicates whether a backup space for this backup space is required. The value of this field is derived from the value of the selected function space.
Booking Type	Select Backup. Active is selected by default.
Inventory Status	Indicates whether or not the inventory for this function space has been reserved.
Set-up Style	This field is automatically populated with the same setup style as the primary function. Users can change this value as appropriate.
Setup Durations Minutes	This field is automatically populated when the Function Space field is completed.
Teardown Duration Minutes	This field is automatically populated when the Function Space field is completed.
Function Space Parent Name	The category to which the space belongs. This field is automatically populated when the Function space field is completed.
Function Space Usable Area	Usable area for the function space. This field is automatically populated when the Function Space field is completed.
Property Unit of Measure	The Unit of Measure used with the property to which the function space belongs. This field is automatically populated when the Function Space field is completed.

Note: It is also possible to add a backup space using the Function Space multi-value group field for the function in the Functions list.

7. In the Function Spaces list, select the required backup space.
8. Click Reserve.

   The backup space is reserved.

About Booking Types for Function Spaces

When you add a new function space, the default Booking Type is Active. The type that is selected in this field is important because it drives other operations for the function. The effects of the Booking Type are:

- Only the rental price of active function spaces is taken into account for the quote price. Therefore, the rental price of a backup or switched space is not rolled up to the Quote Revenue. The customer is not charged for both the primary function space and the backup space. However, if a customer were to add an extra Active space instead of a backup space, then the user would be charged for both active function spaces.
- Threshold calculations are only performed for active function spaces. Backup and switched spaces do not contribute to the threshold calculations. However, if there are more than one active function spaces, then threshold calculations for all active spaces are performed.
- If the function space is either of type Backup or Switched, then function space is not added as a line item in the Function Line Items view. Only active function spaces appear in this view.
- If the Booking Type field is changed, the Need Refresh flag for the function is checked. This means that the function must be repriced, as the price of the functions might have changed.
- Function Spaces of booking type Active are added as line items to the BEO report. For more information about this report, see *Managing Hospitality Reports*.

This topic is a step in *Managing Functions That Require Backup Space*.

Switching a Function to the Backup Space

Before the function begins, the event manager might decide to switch from the original function space to the backup space. This switch causes the following changes to booking types:

- The booking type of the active booking space changes to Switched.
- The booking type of backup function space changes to Active.

When you switch the active and backup functions spaces, their booking types are updated accordingly, as is the pricing information for the function line items. Inventory for the previously active functions spaces is also released.

This task is a step in *Managing Functions That Require Backup Space*.

To switch a function to the backup space

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the quote.
3. In the quote record, click the link in the Name field.
4. In the Functions list, select the function.
5. Scroll down, and click the Function Space view tab.
6. In the Function Spaces list, select the primary function space, and click Switch.

   A dialog box appears, prompting you to either Retain Rental or Clear Rental for the active function space.
7. Click the appropriate button to make the switch you want:
   - To switch to the backup space and also retain room rental information for the primary function space, click Retain Rental.

    - The Item name in the Line Items view remains the same as does the room rental information.
    - The rental information for the backup space is not shown.
  - To switch to the backup space and also clear room rental information for the primary function space, click Clear Rental.
    - The Item name in the Line Items view changes to the name of the backup space.
    - The rental information for the backup space is shown.

  After you click the appropriate button, the booking type of all active function spaces changes to Switched, and the booking type of all backup function spaces changes to Active. Inventory for the previously active function spaces is released.
8. Reserve function space inventory for the newly active function spaces by selecting the function space, and clicking Reserve.

Note: If you switch to the backup space, and the backup becomes the active space for this function, and has the Backup Required flag selected, then you cannot change the booking type of this space to Backup, because spaces that require backup cannot have a booking type of Backup.

Managing Room Blocks at the Quote Stage

A sales representative can create and reserve new property-specific room block line items for a quote record, and then drill down to the inventory display views to confirm reservation information as follows:

- If a generic sleeping room type has been specified for the opportunity, during quote creation, a check is performed to determine whether sleeping rooms are available and effective on the specified dates. Effectivity dates can be defined for a room to prevent it from being considered when booking before or after certain dates. If the room is ineffective, it cannot be booked.
- If sleeping rooms can be booked, the generic sleeping room type is converted to property-specific sleeping rooms. However, if not, the generic sleeping room type is copied to the quote.
- If, after attempting a room block reservation, the sales representative finds that a room type is not available, the sales representative can overbook the room.

If rooms have been overbooked, the sleeping room total group availability will appear as a negative value in the Total Availability view. For more information, see *Checking Inventory Availability*.

This task is a step in *Managing Room Blocks at the Quote Stage*.

This topic includes the following information:

- *Reserving and Overbooking Room Blocks*
- *Copying Room Blocks*
- *Parceling Room Block Inventory from One Room Block to Another*
- *Identifying the Room Block Inventory Buttons*
- *Canceling Room Blocks*
- *Reserving Suite Categories*
- *Reserving Specific Suites*

- *Canceling a Suite Category*
- *Scheduling a Function in a Specific Suite*

Reserving and Overbooking Room Blocks

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

This task is a step in *Process of Managing Hospitality Event Inventory*.

To create and reserve a new room block

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Blocks list, select the room block, and then scroll down to the Room Block Line Items list.
6. In the Room Block Line Items list, add a record and complete the fields.

   > **Note:** When you select a value for the Room Type field, only those sleeping rooms that are effective up to one day before the specified date are shown in the Pick Room Type dialog box. Room block line items can only have one record with the same Day # and Room Type.

7. Click Reserve.

   The Inventory Status field is automatically updated to Reserved, if the room block is available.
8. In the Room Block Line Item record, click the link in the Date field.

   The Total Availability view appears.
9. Navigate back to the Quote Room Blocks list.
10. In the Room Block Line Items list, select a record and click the link in the Room Type field to navigate to the SR Type Availability view.

To overbook a room block

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. Scroll down to the Room Block Line Items list, and select the room block record for which the room type is not available.

   The Inventory Status field shows a value of Unreserved.
6. Click Overbook.

   The Inventory Status field is updated to Reserved.

Sleeping Room Availability Logic

A room block line item for a particular sleeping room type on a particular day is reserved or unreserved using the following logic:

- If the requested room block line item is less than or equal to the total available group rooms, then the Function Space Inventory engine reserves the room block.

- If the requested room block is greater than the total available group rooms, the Function Space engine returns a status of Unreserved.

These availability checks are performed for each room type.

The Total Group Availability for a sleeping room type on a particular date is determined using the following formula:

- Total Authorized - [Max (Transient Optimal, Transient Sold) + Max (Group Room Blocked, Group Room Picked Up)]

  where:

  - *Transient Optimal* is equal to Capacity - Group Optimal
  - *Total Authorized* is equal to Group Authorized + Transient Optimal

Capacity, Group Optimal and Group Authorized numbers are set up in the Property Pricing Admin Inventory Control view.

Transient Sold and Group Rooms picked up values are derived from the Central Reservation System (CRS). Integration with CRS is the responsibility of the system integrators.

Copying Room Blocks

If necessary, you can copy room blocks. This can help when entering numerous room blocks for a quote. When you copy a room block, the room block details and existing line items are copied to the new room block.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To copy a room block

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required record.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. In the Room Blocks list, select the required room block, and then click Copy.

   The new room block appears in the list.

Parceling Room Block Inventory from One Room Block to Another

Parceling inventory is the transfer of reserved sleeping rooms from one room block to another room block. For example, if there are 100 sleeping rooms reserved as part of a room block, and only eighty of these rooms have been picked up by customers, then the other twenty can be transferred to another room block. As these sleeping rooms have already been reserved, they will not have to be reserved after the transfer.

This functionality can be used when reserving rooms for different types of people attending a function. For example, if the customer reserves 100 rooms, it might be necessary to create a separate room block for VIPs after the initial room block has been created.

This task is a step in *Managing Room Blocks at the Quote Stage*.

To parcel room block inventory from one room block to another

1. Navigate to the Quotes screen, then the List view.
2. In the quotes list, query for and select the required quote.
3. Click the link in the Name field, and then click the Room Blocks tab.
4. In the Room Block list, select the room block from which to transfer sleeping rooms.
5. Scroll down to the Room Block Line Items tab, select the type of sleeping rooms to transfer, and click Parceling.
   The Reservation Transfer selection dialog box is displayed.
6. Complete the fields, and click OK.
   The following table describes some of the fields.

Field	Comments
Existing Reserved Rooms	Shows the amount of rooms of this type that have already been reserved for the selected room block. This field is read only.
Room Type	The type of room to be transferred between the room blocks. This field is read only.
From Room Block	The name of the room block from which the rooms are to be transferred. This field is read only.
To Room Block	The name of the room block to which the rooms are to be transferred. Click the single select button, select the room block to which to transfer rooms, and click OK in the To Room Block selection dialog box.
# Transferred	The number of rooms to be transferred between the room blocks. This value is calculated as the Blocked value minus the Picked up value.

The required number of rooms are transferred between the room blocks, and this is reflected in the Contracted field for the room block line items.

Note: Parceling works primarily on the blocked numbers and it is this number that is transferred between room blocks. However, for ease of use the contracted and projected numbers are also decreased by the same amount as the blocked numbers. If the contracted number becomes negative in the process, an error message is displayed.

Identifying the Room Block Inventory Buttons

The following inventory buttons can be used in the Room Blocks view tab:

- **Release.** Click this button to release the inventory associated with the whole room block.
- **Reprice.** Click this button to recalculate the price of the room block.

- **Reprice All.** Click this button to recalculate the price of all room blocks.
- **Reserve.** Click this button to reserve the selected room block.
- **Calculate Rates.** Click this button to calculate the rates for all room blocks.
- **Equalize.** Click this button to convert all blocked values to picked up values. A user clicks this button after a cutoff date has passed, when all blocked numbers for all line items become equal to the picked-up numbers.

Canceling Room Blocks

The event manager uses the Room Blocks view to confirm and update occupancy information and reservation details. If the particular room block is no longer required, the event manager can cancel the room block.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To cancel a room block

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Blocks list, select the room block record, and then scroll down to the Room Block Line Items list.
6. In the Room Block Line Items list, select one or more room block line items.
7. Click Cancel Room Block.

   The Inventory Status field is updated to Unreserved, and the Status field is updated to Cancel.

Reserving Suite Categories

A sales representative can book a suite (category) for use as a sleeping room. After the booking process is complete, the sales representative can navigate to the Function Space Diary view and confirm the reservation information.

The Function Space Diary shows the availability and event function schedule information in a Scheduler format, and users can view the schedule of bookings against a function space category or specific space. In the diary views, the user can specify a start date or time scale to view booking information, and change bookings by selecting and (without releasing the selection) then moving the booking to another time or date.

When booking a suite category, the sales representative can see the suite category displayed in the Function Space Diary with bars extending across the Scheduler for the entire length of time between check-in and check-out times for the suite sleeping room.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To reserve a suite category

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Block Line Items list, create a new record, select a room type of Suite Category, and complete the remaining fields.

> **Note:** When selecting a value for the Room Type field, note that only those sleeping rooms that are effective up to one day before the specified date are shown in the Pick Room Type dialog box.

6. Click Reserve.

   The Inventory Status field is updated to Reserved if the room block is available.
7. Navigate to the Function Space Diary screen, and query for the property.
8. From the Property form, scroll down to the Function Space Diary Scheduler.
9. If necessary, update the Start Date and Time Scale fields, and then click Go.

Reserving Specific Suites

The sales representative can reserve a specific suite within a suite category reservation. In this instance, the user first selects the suite category as a room block line item, and then in the specific suites list, selects a specific suite related to the suite category. After the specific suite record is saved, the reservation process automatically starts.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To reserve a specific suite

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Block Line Items list, add a record.
6. In the record, select Suite Category in the Room Type field, and then complete the remaining fields.
7. Click Reserve.

   The Inventory Status field is updated to Reserved if the room block is available.
8. Drill down on the Room Block Name value.

   The Room Blocks screen, Line Items view appears.
9. Scroll down to the Specific Suites list.
10. In the Specific Suites list, create a new record, and select a room from the Room dialog box.
11. Save the record.

    The reservation processes automatically.

Canceling a Suite Category

The event manager can confirm and update occupancy information and reservation details using the Room Blocks view. If the particular suite category is no longer required, the event manager can cancel it.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To cancel a suite category

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.

3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Block Line Items list, select a room block line item of room type Suite Category.
6. Click Cancel.
   The Inventory Status field is updated to Unreserved and the Status field is updated to Cancel.

Scheduling a Function in a Specific Suite

The sales representative can schedule a function in a reserved specific suite used for sleeping. After entering function information for the specific suite, the sales representative clicks Reserve for the function.

> **CAUTION:** Do not attempt to schedule a function for an unreserved specific suite, even if the Function Scheduling button is enabled.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To schedule a function in a specific suite

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Room Blocks view tab.
5. In the Room Block Line Items list, select a room block line item of room type Suite Category.
6. Drill down on the Room Block Name value.
   The Room Blocks screen, Line Items view appears.
7. Scroll down to the Specific Suites list.
8. In the Specific Suites list, select the reserved specific suite record, and then click Function Scheduling.
   Clicking this button creates a new function record and takes the user to the Functions screen, More Info view. Only the record the user creates is displayed in the Functions list. The user must specify a start and end time for the function before reserving it. The user can change the function type.
9. In the function record, update the fields, and then click Reserve.

Background Processes at the Quote Level

Two background workflow processes are used to set the entire inventory of a quote to unreserved. The administrator must verify that these workflows are activated. For more information on activating workflows, see *Activating Hospitality Workflows*.

The two background processes that run against the quote are as follows:

1. **Process 1.** After the procedures in *About Managing Functions at the Quote Stage* are completed, the first background process begins:
   a. A background process is activated that monitors the quote. This process is always available.
   b. The Inventory Status field is set to Reserved for Function records and Sleeping Room records associated with the quote.

c. After a predefined amount of time passes, Siebel Hospitality checks the Status field on the quote record.
d. If the Status field is still set to Prospect, the workflow process updates the Inventory Status to Unreserved for both Functions and Sleeping Rooms associated with the quote, and the inventory is released. However, the status for each function and sleeping room remains as Prospect.

2. **Process 2.** When the Decision Date field of the quote is completed, the second background process begins:
   a. A background process is activated that monitors the Decision Date. This process is always available.
   b. When the Decision Date passes, Siebel Hospitality automatically releases all inventory, which includes Function Space Inventory and Room Block Inventory.

Note: Sample workflows are available, but the workflows can be changed to conform to the requirements of your company.

Changing Inventory-Critical Reservation Attributes

The sales representative can continue to update the function, room block, and quote records throughout the sales process. If inventory is not reserved, the updates do not affect the status of the records. However, if inventory is being held, updates might affect the status of the inventory.

For example, if an existing function that has an arrival date of March 14 must be postponed until April 23, the date change on the function record might affect the Reserved status for the identified function space. If the inventory is not available on the new date, users can undo their changes before losing the inventory on the original date.

This task is a step in *Process of Managing Hospitality Event Inventory* and includes the following topics:

- *About Inventory-Critical Fields at the Function Level*
- *About Inventory-Critical Fields at the Room Block Level*
- *About Inventory-Critical Fields at the Quote Level*

About Inventory-Critical Fields at the Function Level

Modifications to several fields in the function record can affect inventory. If multiple updates are made to a reserved function, Siebel Hospitality alerts the user that additional actions must be performed.

Overview of Date and Time Changes for Functions

Whenever the user changes the values for Start Time, Duration, Date, and Day #, and attempts to save the function record, a message provides a suggested course of action.

Users can configure the application to eliminate the reminder dialog box, or they can set up a process that automatically checks availability. See the procedure to configure availability status checking later in this topic for more information.

When the user sees the following message, the user can proceed with the reservation by clicking OK.

```
Function parameters have changed. Would you like to check availability with new parameters?
```

Two results are possible after the availability check:

- The function space is still available with the updated parameters (Date, Start Time, or Duration) and the function space is automatically reserved with the new value. The Inventory Status is set to Reserved, and the updated parameters are saved.

- The reservation is not possible, and the user sees the following message:

```
The availability check has failed. Click OK to save, or Cancel to undo.
```

If the user clicks OK, the updated parameter remains, and the Inventory Status becomes Unreserved. If the user selects Cancel, the original parameters are restored and the Inventory Status remains as Reserved.

To configure availability status checking

1. Log in to Siebel Tools as an administrator.
2. In the Object Explorer, navigate to Applet.
3. Query for the appropriate function or room block applet (for example TNT SHM Functions List Applet or TNT SHM Room Blocks List Applet).
4. From the Tools menu, choose Tools, Applet, and then the Applet User Prop menu item.
5. Query for the Check Availability Status User.
6. In the Value field, enter the appropriate information.
    - If you do not enter any value for this field, the reminder dialog box is displayed to the user.
    - If you enter Yes as the value, the automatic availability check is performed and no reminder dialog box is displayed.
    - If you enter No as the value, no reminder dialog box is displayed and no automatic availability check is performed.
7. Recompile and replace the SRF.

About Combining a Function Space and a Setup Style

The user can see the setup styles associated with the specific space on a particular property from the Property Administration screen, Specific Space view, which includes a Setup Style list. Setup Styles are created by the administrator during property administration. For more information, see *Associating Setup Styles and Packages with Properties*.

The user can update either the function space or setup style fields using the Quote Function view. When the user updates either of these fields, Siebel Hospitality attempts to validate the Setup Style-Function Space combination. If the combination is invalid, the following message appears:

```
Invalid combination of function space and setup style.
```

If the Setup Style is changed and the Setup Style-Function Space combination is valid, the value selected in the Setup Style field is saved.

If the function space is changed for a reserved function and the Setup Style-Function Space combination is valid, the selected values are saved.

About Function Status and Released Inventory

When the user changes the Function Status field value to a value that releases inventory, the Inventory Status field is updated to Unreserved. The function status values that result in released inventory are:

- Cancel
- Lost/Turndown

Note: If the user changes the Function Status value to Lost/Turndown, inventory is released for all function spaces.

About Inventory-Critical Fields at the Room Block Level

Inventory critical fields also exist at the room block level. In a process similar to that which occurs at the function level, Siebel Hospitality monitors for changes and verifies that the records are valid after each update. If multiple updates occur for a reserved room block record, a message appears that provides a suggested course of action.

About Date and Time Changes

When the user updates either the Date or the Day # field for a reserved room block, the same process occurs as when changes are made at the function level. For more information, see *About Inventory-Critical Fields at the Function Level*.

About Room Block Changes and Availability Checks

When the user increases the room block for a reserved room block record, a message alerts the user that an availability check must be performed. The standard reservation process is followed, and the user can either save the changes with a Reserved or Unreserved Inventory Status, or click Cancel to restore the original Blocked values.

About Inventory-Critical Fields at the Quote Level

Changing the values in certain fields in the quote record can also impact the status of inventory.

Overview of Arrival Date Updates

If the user updates the Arrival Date in the quote record, a message alerts the user that the new date might result in the loss of reserved inventory. Siebel Hospitality attempts to perform a reservation for the new date and automatically updates the Date field for the Room Block Line Item and Function records. If the inventory is available, Siebel Hospitality rebooks the inventory against the new arrival date. If the availability check fails, the Inventory Status field is set to Unreserved for the Room Block Line Item and Function records and Not Booked for the Function Line Item records.

If the user updates the arrival date and nothing changes for the selected sleeping rooms, check that the sleeping room is effective on the new date. If the sleeping room is not effective, the change will not be taken into account.

Time Shifting Event Quotes and Event Quote Items

As part of managing hospitality event inventory, you can shift booking times for functions and sleeping rooms. To shift nonfunction line items, you must shift the quote that includes those items. You can perform time shifts as well as review details and summaries using the subviews that are available from the Quotes screen, Time Shift view.

This topic addresses the following subjects:

- *Time Shifting Event Functions and Room Blocks*
- *Reviewing Time Shift Information at the Quote Level*
- *Event Shifting at the Quote Level*

Note: The property associated with the functions or room blocks that a user wants to time-shift must have both profit series and day parts defined. If no profit series or day parts are defined, an error message appears when the user attempts to perform a time shift.

This task is a step in *Process of Managing Hospitality Event Inventory*.

Time Shifting Event Functions and Room Blocks

When a user attempts to time shift a function, nonfunction line item, or room block, Siebel Hospitality verifies whether the function space, category, or sleeping room is still effective for the date to which the booking is being shifted. For example, the effective end date for Salon A is January 15, 2009. A function is reserved for January 14, 2009 in Salon A. If the user time-shifts the function to a date on which the function space is no longer effective (for example, January 16), the function space is not copied to the revised quote and the inventory status for the booking changes to Unreserved.

Performing a Time Shift of Event Functions

To perform a time shift of an event function, follow this procedure.

To perform a time shift of event functions

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Time Shift view tab, and then click the Function Shift view link.
5. In the Original Quote Functions list, select one or more functions, and then click Time Shift.

   In the Time Shift Functions dialog box, perform one of the following steps:
   - Select the Shift by Time check box, and then enter the hours and minutes.
   - Select the Shift by Day check box and enter the number of days. A negative day value shifts the function back, and a positive day value shifts the function forward in time.
   - Select the Shift by Date check box, and select a date.
6. Click Shift Functions.
7. In the Revised Quote Functions list, click Accept to accept the revised function or Reject to reject the revised function.
8. Click the Date field in either of the Function lists to navigate directly to the Function Space Diary and review the original or revised function in the context of other bookings. Users can also click on the Start Time value to navigate directly to the Functions screen, Line Items view.

   When a user time shifts a function, an attempt is made to reserve both the active and backup spaces for the function. If it is not possible to reserve the active space, then the backup space is not reserved. However, if the active space is reserved, it is not necessary for the backup spaces to be reserved in order to time shift the function.

Performing a Time Shift of Event Room Blocks

To perform a time shift of an event room block, follow this procedure.

To perform a time shift of event room blocks

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.

3. In the Quote record, click the link in the Quote # field.
4. Click the Time Shift view tab.
5. In the Time Shift view, click the Room Block Shift link.
6. In the Original Room Blocks list, select one or more room block records.
7. Click Time Shift.
8. In the Time Shift Room Blocks dialog box, select the option appropriate for your requirements:
   - Select the Shift by Day check box, and then enter the number of days.
     A negative day value shifts the room block back, and a positive day value shifts the room block forward.
   - Select the Shift by Date check box, and then choose a date.
9. Click Shift Room Blocks.
10. If necessary, click the single select button in the Room Type field, and choose a different room type for any of the records.
11. In the Revised Room Blocks list, click Accept to accept the revised room block or Reject to reject the revised room block.

    Note: If the sleeping room is not effective during the new dates, the change will not be taken into account.

Reviewing Time Shift Information at the Quote Level

Use the Quotes screen, Time Shift, Summary view to review details of both functions and room blocks that have been time shifted. This summary information is only based upon the active function spaces for a function, and does not take backup spaces into account.

After time shifting functions, you can compare the revenue estimates for both the original and revised functions. This comparison can be made using the Quotes screen, Time Shift, Function Shift (Revenue) view.

If one or more meeting packages are applied to the quote, then any nonfunction line items associated with the meeting packages are also shifted during a quote-level time shift. In this case, you can use the Quotes screen, Time Shift, Summary view to review details of nonfunction line items that have been time shifted.

Note: Revenue is calculated at the time of the quote, from the defined average value. For more information about average values, see *Setting Up Average Values and Function Types*. However, if the revenue is to be calculated from the line items, then select the Line Item Sum check box on the Quotes screen, Functions view.

To review the time shift summary

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Time Shift view tab, and then click the Summary link.
5. Use the Original Quote Summary and the Revised Quote Summary forms to compare the details.

To compare time shift revenue estimates

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. Click the Time Shift view tab, and then click the Function Shift (Revenue) link.

5. Use the Original Revenue Estimates and the Revised Revenue Estimates lists to compare the estimated revenue.

Event Shifting at the Quote Level

During the event planning process, customers often change the start and end time of an event that affects a series of function space bookings. For example, a customer might schedule an event that spans three days, Monday through Wednesday, and each day has an agenda that corresponds to function space bookings. The customer decides to start the event on Tuesday instead of Monday, keeping the same three-day agenda.

When shifting the time of a series of bookings, the Function Space Inventory engine can reschedule bookings into time slots that are occupied by other bookings in the same series. For example, Monday bookings are moved to Tuesday time periods that were occupied by Tuesday bookings; Tuesday bookings are moved to Wednesday time periods that were occupied by Wednesday bookings, and so on.

When bookings are shifted to different dates, inventory might be lost or not secured for the desired dates. Inventory might be available but priced too high for the customer. In these situations, the event and day shifting process helps the sales user evaluate a change to the quote by viewing the room block pricing on the new date without losing the previous inventory.

To perform an event shift at the quote level

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. Click Time Shift.
4. In the Time Shift Event dialog box, perform one of the following steps:
   - Select the Shift by Day check box, and enter the number of days.

     A negative day value shifts the event back, and a positive day value shifts the event forward.
   - Select the Shift by Date check box, and choose the new date.
5. Click Event Shift.

About Run of House Room Types

A *run of house* (ROH) room type is the most common or standard room category in a hotel, featuring basic amenities. When you select a run of house room, the actual room is determined by the hotel, according to availability, at the time of check-in. Run of house is a virtual room type that can be any associated, available room type at a hotel. This enables a property to maximize the potential number of rooms being sold.

Run of house bookings are generally used for groups and not for transients. When a hotel is working with a group, the group might not care what room type is assigned, as long as a certain number of rooms is reserved. In this case, the hotel can sell the ROH room types to the group. The actual rooms that are given can range from all standard rooms to all luxury rooms, depending on availability.

The Siebel Hospitality functionalities that support run of house room types are as follows:

- Differentiate ROH room types from sleeping room and suite room types.
- Create multiple ROH room types.

- Associate generic room types with run of house room types at a property.
- Map run of house room types to specific room types at a property.
- Take run of house room types into account when checking for availability.
- Display run of house room types availability in the Availability views.
- Display ROH room types in the quote process, rather than the individual room types that make up the ROH room types.

A property can have multiple ROH room types. The property might, for example, have a ROH Standard room type and a ROH Deluxe room type. ROH room type names are user-defined and can be any group of characters. Availability checks take into consideration the number of ROH room types and display the correct room counts.

Scenario for Managing Run of House Rooms

This topic gives one example of how a Run of House room type might be used. This topic describes an instance of one generic run of house room type with multiple associated property-specific room types. You might use the Run of House functionality differently, depending on your business model.

A corporate client contacts a hotel sales representative and requests to book an event requiring 100 sleeping rooms of any kind. The client does not care what rooms are booked, and asks only the best price for the 100 rooms.

The sales representative creates an opportunity in Siebel Hospitality and enters the details including properties, function spaces, and sleeping rooms. When entering the sleeping room details, the sales representative selects a run of house sleeping room type and specifies 100 rooms on a specific date.

The sales representative then generates quotes for the properties that are attached to the opportunity and checks the results for sleeping room availability. When the quote is generated, Siebel Hospitality maps the generic ROH room type to a property-specific ROH room type and checks the availability of the property-specific ROH room type.

The results appear as either reserved or unreserved. If the sleeping room availability is unreserved for the run of house rooms, the sales representative can decide to overbook the rooms. At any time, the sales representative can view the sleeping room availability. The sales representative might also decide to change a run of house room type to another room type.

Subsequently, the sales representative follows the standard group sales process to complete the event booking and conduct the event.

About Inventory Availability for Run of House Rooms

If sleeping room types at a property include ROH room types, the following processing occurs in the Total Group Availability views:

- Before an ROH booking occurs, the ROH count appears as 0 (zero) in the counts for each day and date.
- When a booking for ROH rooms is requested, the Availability Check verifies the counts against the Total Group Availability totals. Availability is checked against the overall Total Group Availability count of the ROH room type and the property-specific room types that are mapped to that ROH room type. If the requested number of ROH rooms is less than or equal to the overall Total Group Availability count, then the booking occurs and the ROH rooms are reserved.

- After an ROH booking occurs, the ROH count appears as a negative number in the counts for each day and date. The property-specific room types that are mapped to the ROH room types are not decremented. However, the overall Total Group Availability counts are decremented, thus keeping the totals accurate.

For more information about availability checks, see *Checking Inventory Availability*.

As the day of arrival approaches, you must manually convert the reserved ROH room types into actual property-specific room types. This conversion typically occurs in the Quote screen, Room Blocks view. It is recommended that you perform this conversion several days before the day of arrival to the day of arrival. During manual conversion, the counts of the property-specific room types are decremented to reflect the new totals, and the counts of ROH rooms are incremented from negative numbers to 0.

CAUTION: When you change the room type from an ROH room type to a property-specific room type, the first price (that is, the ROH room type price) remains in place. However, if you click the Reprice button or the Reprice All button, Siebel Hospitality resets the pricing and applies the price of the property-specific room type. Consequently, if you enter a ROH room type price (or any negotiated price) and do not want that price to change, do *not* click Reprice or Reprice All.

Scenarios for Reserving Run of House Rooms

This topic describes scenarios for using Run of House room type reservations.

Scenario for One Run of House Room Type

This topic gives one example of how Run of House room type reservations might be used. You might use the Run of House reservation functionality differently, depending on your business model.

A property has a total of 20 sleeping rooms of two room types, Standard and Deluxe. The property has defined one Room of Hours (ROH) room type, ROH 1, which is associated with both property-specific sleeping room types. The property-specific room types, their associated ROH room types, and their numbers of rooms are shown in the following table.

Type	Associated ROH Type	Number of Rooms
Standard	ROH 1	10
Deluxe	ROH 1	10
Total Group Availability	Not applicable.	20

For one specific day, no bookings have yet occurred. Availability totals for that day are therefore at maximum for all room types, as shown in the following table.

Type	Availability
Standard	10
Deluxe	10

Type	Availability
ROH 1	0
Total Group Availability	20

At maximum availability with no bookings, the ROH room shows as zero (0) availability, while the component property-specific room types show at their maximum availability numbers.

Then, a group books three ROH 1 rooms for that day. The new availability totals for the day are shown in the following table.

Type	Availability
Standard	10
Deluxe	10
ROH 1	-3
Total Group Availability	17

The availability totals for property-specific room types associated with the ROH room types are not decremented. Instead, the ROH room types show their availabilities as the negatives of the numbers booked, and the total group availability for that day is decreased by the three ROH bookings, to 17.

When the day approaches for which the ROH room reservations have been made, the revenue manager of the property moves all three ROH 1 rooms to the Standard and Deluxe room types.

For the purpose of this scenario, assume that the ROH bookings are the only reservations at that property for that day. The final availability totals for the day are shown in the following table.

Type	Availability
Standard	8
Deluxe	9
ROH 1	0
Total Group Availability	17

The property-specific room type numbers are decremented, while the ROH room type number is incremented from a negative number to 0. The Total Group Availability remains at 17, because the total of reserved rooms has not changed; only modifications to the room type assignments have occurred.

Scenario for Two Run of House Room Types

This topic gives one example of how Run of House room type reservations might be used. You might use the Run of House (ROH) reservation functionality differently, depending on your business model.

A property has a total of 500 sleeping rooms of several types. The property has defined two ROH room types, each associated with two property-specific sleeping room types. The property-specific room types, their associated ROH room types, and their numbers of rooms are shown in the following table.

Type	Associated ROH Type	Number of Rooms
Standard	ROH 1	200
Deluxe	ROH 1	100
Upgrade	ROH 2	75
King Size	ROH 2	125
Total Group Availability	Not applicable.	500

For one specific day, no bookings have yet occurred. Availability totals for that day are therefore at maximum for all room types, as shown in the following table.

Type	Availability
Standard	200
Deluxe	100
Upgrade	75
King Size	125
ROH 1	0
ROH 2	0
Total Group Availability	500

At maximum availability with no bookings, ROH rooms show as zero (0) availability, while the component property-specific room types show at their maximum availability numbers.

Then, a group books 100 ROH 1 rooms and 50 ROH 2 rooms for that day. The new availability totals for the day are shown in the following table.

Type	Availability
Standard	200
Deluxe	100
Upgrade	75
King Size	125
ROH 1	-100
ROH 2	-50
Total Group Availability	350

The availability totals for property-specific room types associated with the ROH room types are not decremented. Instead, the ROH room types show their availabilities as the negatives of the numbers booked, and the total group availability for that day is decreased by the 150 ROH bookings, to 350.

When the day approaches for which the ROH room reservations have been made, the revenue manager of the property performs the following tasks:

- Moves all 100 ROH 1 rooms to the Standard and Deluxe room types.
- Moves all 50 ROH 2 rooms to the Upgrade and King Size room types.

For the purpose of this scenario, assume that the ROH bookings are the only reservations at that property for that day. The final availability totals for the day are shown in the following table.

Type	Availability
Standard	150
Deluxe	50
Upgrade	50
King Size	100
ROH 1	0

Type	Availability
ROH 2	0
Total Group Availability	350

The property-specific room type numbers are decremented, while the ROH room type numbers are incremented from negative numbers to 0. The Total Group Availability remains at 350, because the total of reserved rooms has not changed; only modifications to the room type assignments have occurred.

Checking Inventory Availability

There are three inventory display views that can be accessed using the Property Screen. These views are used to display available inventory for sleeping rooms, allowing the user to assess the availability of different sleeping room types on a daily basis for a seven-day period. The views and related topics are:

- **Total Group Availability.** For more information, see *Reviewing Total Group Availability*.
- **SR Type Availability.** For more information on sleeping room type availability, see *Reviewing Sleeping Room Type Availability*.
- **Total Availability.** For more information, see *Reviewing Total, Group, and Transient Availability*.
- **Group Projected/Blocked.** For more information, see *Reviewing Group Projected and Blocked Availability*.

Two additional views help the user locate quotes and opportunities associated with the property. The two views include:

- Property screen, Quotes view
- Property screen, Opportunities view

Reviewing Total Group Availability

The Total Group Availability view shows the group sleeping room availability information for a particular property. The availability numbers are displayed by type and date, with the default date equal to the current date spanning across an eight-day period.

The information displayed on the view includes:

- **Group Authorized.** Displays values for each room type (Deluxe, Standard, and Upgrade).
- **Group Optimal.** Displays values for each room type.
- **Group Blocked.** Displays total values for the function statuses Prospect, Hold, T1, T2, and Definite. A separate total value is also shown for function statuses Definite and Hold.
- **Group Projected.** Displays total values for the function statuses Prospect, Hold, T1, T2, and Definite. A separate total value is also shown for function statuses Definite and Hold.
- **Total Group Availability.** Displays values for each room type.

Use the Date form to query for a different start date and view the group availability numbers for an eight-day range, starting with the specified date.

This task is a step in *Process of Managing Hospitality Event Inventory*.

Dates/Notes Button

The Dates/Notes button displays information about any special dates or sell notes for a particular property. When the user clicks the Dates/Notes button, a list of Sell Notes/Special Dates corresponding to the date range shown for inventory appears.

Go to Diary Button

The Go to Diary button allows the user to navigate directly to the Function Space Diary. The date shown in the diary is the first date in the date range of the Total Group Availability view.

With Tentative/Without Tentative Button

The With Tentative/Without Tentative button switches the display to show or exclude records with a tentative status (T1, T2).

To review total group availability

1. Navigate to the Property screen.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Click the Total Group Availability view tab.
5. (Optional) Enter a date, and click Search.

> **Note:** Users can also use the paging buttons to move forward and backward one week or one day at a time.

Reviewing Sleeping Room Type Availability

The SR Type Availability view shows the availability information for a specified sleeping room type at a particular property. The availability numbers are broken down by room type and date. When users navigate to this view, they can see the sleeping room availability for the current date as well as for the next eight days.

Using the Date form, users can query for different sleeping room types and date combinations to display the appropriate availability numbers.

A Dates/Notes and a Go to Diary button are available in this view. See *Reviewing Total Group Availability* for more information on these buttons.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To review sleeping room type availability

1. Navigate to the Property screen, then the Properties view.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Click the SR Type Availability view tab.
5. (Optional) Enter a date and sleeping room type in the fields, and click Search.

Navigating to the Sleeping Room Type Availability View

Users can navigate to the Property SR Type Availability view by clicking the Room Type field in any Room Block Line item record in the Quotes Room Blocks view. Using this method, they navigate to the SR Type Availability view and see availability information beginning with the date assigned to the Room Block Line Item record.

Reviewing Total, Group, and Transient Availability

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

A Dates/Notes and a Go to Diary button are available for the Total Transient Availability and Total Group Availability lists. See *Reviewing Total Group Availability* for more information on these buttons.

The Property form provides high-level information about the property in the Key Property Information, Property Classification, Capacity Information, Systems Information, Units Information, and Rating Information sections of the form.

Use the Date form to query for a different start date and view the availability numbers for an eight-day range, starting with the specified date. The start date specified in the query is displayed synchronously across the three lists. Under the Date form, three lists show availability figures by total, group, and transient availability. By default, all three lists show availability counts, by type, starting with the current date. The date fields in the various sections of the view interact in the following ways:

- In the Date form, when you complete the Date field and click Search, the first dates in the three lists change to match the Date field value in the form.
- In the Total Availability list, when you run a query with a date or click the arrow buttons, the dates in the lists that follow change to match the dates in the Total Availability list.
- In the last two lists, when you change the dates either by querying or by clicking the arrow buttons, the dates in the Total Availability list do *not* change to match.

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

The following table describes the information that appears in the rows in the Total Availability list.

Field	Comments
Capacity	A calculated field that displays a sum of the all the sleeping rooms for the property.
Group Picked Up	Total number of sleeping rooms that were actually picked up from blocked group rooms.
Total Authorized	Calculated value. The total number of sleeping rooms available for the property.
Total Booked	Calculated value. The sum of blocked group and transient rooms.
Total Available	Calculated value. The number of rooms available for booking.

Field	Comments
Occupied%	The ratio of the total booked to capacity.
Actual Available	The difference between capacity and total booked.
Sell Notes	Revenue managers can flag days as high priority for event sales and add sell notes to describe the sales strategy the property is implementing. This row shows the number of sell notes that are applicable on that given date.

The Total Group Availability list available from these screens is identical to the list that appears in the Property screen, Total Group Availability view.

The Total Transient Availability list shows the number of transient sleeping rooms available for a particular property. The numbers are broken down further into types that include:

- Transient Booked
- Transient Available
- Transient Optimal
- Sell Notes

Transient availability information is typically populated by system integrators.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To review total availability

1. Navigate to the Property screen, then the Properties view.
2. From the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Click the Total Availability view tab.
5. (Optional) Enter a date and click Search.

Navigating to the Total Availability View

Users can navigate to the Property screen, Total Availability view by clicking the Date field in any Room Block Line item record. For example, a user can click the Date field in the Quotes screen, Room Blocks view. Using this method, the user can navigate to the Total Availability view and see availability information beginning with the date assigned to the Room Block Line Item record.

Users can also navigate to the Total Availability view from the Function Space Diary screen. The following procedure describes this method.

To navigate to the Total Availability view from the Function Space Diary

1. Navigate to the Function Space Diary screen, then the Function Space Diary view.
2. Query for a property record.
3. Click the appropriate diary view tab.
4. In the selected view, enter the required start date and time scale, and click Go.
5. Click the date shown on the major time axis in the Function Space Diary.

The Total Availability view appears showing a start date that corresponds to the date entered in the Start Date field in the diary.

Reviewing Group Projected and Blocked Availability

The sales representative and the revenue manager can use the Property screen, Group Projected/Blocked view to gain a better understanding of what is projected or blocked for each quote for the property across the time period.

The Group Projected/Blocked view contains a Property form, a Date form, and two read-only lists. A Dates/Notes and a Go to Diary button are available for the Total Group Availability list. See *Reviewing Total Group Availability* for more information on these buttons.

The information displayed on the view includes:

- Quote Name
- Quote Status
- Sales Manager
- Event Manager
- Blocked and projected values for each day in the date range
- Total blocked and projected values for the date range

The date fields in the various sections of the view interact in the following ways:

- In the Date form, when you complete the Date field and click Search, the first dates in the following lists change to match the Date field value in the form.
- In the Group Projected / Blocked list, when you run a query with a date or click the arrow buttons, the dates in the Total Group Availability list changes to match the dates in the Group Projected/Blocked list.
- In the Total Group Availability list, when you change the dates either by querying or by clicking the arrow buttons, the dates in the Total Availability list do *not* change to match.

The Total Group Availability list available from these screens is identical to the list that appears in the Property screen, Total Group Availability view.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To review group projected and blocked availability

1. Navigate to the Property screen, then the Properties view.
2. From the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Click the Group Projected / Blocked view tab.
5. (Optional) Enter a date, and click Search.
6. Scroll down to the end of the page to view the total values for each day.
7. Scroll across the page to view the total values for the date range.

Actualizing a Function

The Actualization process is performed on Function and Room Block records. The process of setting a sales status to Actual occurs after the function is completed or the room block has been used. At that point, the revenue becomes actualized. See the table in *About Function Status Values* for a description of the Actual status.

Actualized revenue is the total revenue generated from all sales (transient room, group room, catering, and so on). When the term is applied to sleeping rooms, it refers to the number of sleeping rooms on the property that were actually used. Actual status can also be applied to food and beverage covers and event attendees.

When the function and room block records are actualized, the following actions occur:

- The function or room block record becomes read only.
- The Inventory Status field is automatically updated to Actual.
- The Function is displayed as Actual in the Function Space Diary.

This task is a step in *Process of Managing Hospitality Event Inventory*.

To actualize a function

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote associated with the function that is to be actualized.
3. In the Quote record, click the link in the Name field.
4. In the Quote Functions list, select the completed function record, and update the Function Status field to Actual.
5. Save the record.

To actualize a room block

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Quote # field.
4. In the Room Blocks Line Items list, select the Room Block Line Item record, and update the Status field to Actual.
5. Save the record.

About Out of Order and Unavailable Spaces

Out of Order and Unavailable records are defined at the property level. Both record types prevent any bookings against the specific space. For more information about creating Out of Order and Unavailable records, see *Marking Function Spaces as Unavailable or Out Of Order*.

The Out of Order and Unavailable records are referenced when the user creates bookings against a specific space. If the user tries to book a function against a specific space at the date or time the specific space has an Out of Order or Unavailable record associated with it, the Inventory Status is set to Unreserved.

> **Note:** Out of Order and Unavailable bookings cannot be changed by selecting and (without releasing the selection) then moving the booking to another time or date in the Function Space Diary.

20 Booking Hospitality Assets

Booking Hospitality Assets

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

- *About Hospitality Assets*
- *Process of Booking Hospitality Assets*
- *Defining the Inventory Status Colors*
- *Reserving Critical and Noncritical Assets for Function Line Items*
- *Reserving Cluster Assets for Function Line Items*
- *Viewing Assets Associated with a Product*
- *Viewing Asset Availability and Booking Information*

About Hospitality Assets

This topic describes asset booking in Siebel Hospitality. This topic includes the following topics:

- *Description of Hospitality Assets*
- *Overview of Booking Hospitality Assets*
- *Automatic Reservation of Critical Assets*
- *AutoBook and Noncritical Assets*
- *About Double-Booking and Rerenting of Assets*
- *About Cluster Booking of Assets*

Description of Hospitality Assets

An *asset* is a physical instance of a product that is tracked in a centralized database and associated with an individual property. Users reserve required items for an event using automated booking for critical resources and one-click booking for noncritical resources.

Unlike function space products and room block products, catering products are booked as assets. When a user tries to reserve a product, the user is actually reserving assets, not catering products.

Multiple assets can be associated with a single product. For example, the user might create a product record called Piano with the following assets:

- Yamaha Piano at New York property, Serial # 7896-0987
- Wurlitzer Piano at London property, Serial # Z765-9876

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

Each catering product is classified by resource type. The three types of resource types are:

- **Critical.** A *critical product* is any resource that is critical to the event; very few products are defined as critical. If, for example, there is only one grand piano for the entire property, the piano might be designated as a critical product. A critical product must be booked in order that an event can be carried out successfully at a property. When a quote is generated for an NPP, the availability check for critical asset inventory is not started.
- **Non Critical.** A *noncritical product* is defined as any resource that is generally available in sufficient quantities at the property, but must be reserved. An example is a projector.
- **General.** General products are common resources that are not difficult to replenish and do not require booking. Examples include tables and chairs, which are available in sufficient quantities at the property and do not have to be booked.

In a typical asset record, the Product field shows the centralized product definition. The Property field shows the property with which the asset is associated. The asset Description field allows the asset description to be customized by property. The Ownership field shows rental and leased assets tracked by owner.

Overview of Booking Hospitality Assets

When booking a Hospitality asset, a sales representative can book both property-specific products, and can also book common products that have assets at various properties. For example, a particular property might have video conferencing capabilities that are specific to that property. On the other hand, many properties might have projectors for conferences that can be provided to other properties if requested. In this case, the sales representative would only be able to book the video conferencing facilities for the property at which it is available. However, it would be possible to book common product assets, like the projector, from another property.

Siebel Hospitality allows the user to book property-specific assets using the AutoBook and Double Book functionality. In order to book assets from other properties, the sales representative must start cluster booking to add cluster products, and then must book these products using Cluster AutoBook and Cluster Double Book.

After assets have been booked, you can view all assets associated with a product, and also view the availability and booking information for these assets, and if necessary locate an appropriate substitute for the asset if it cannot be booked.

Automatic Reservation of Critical Assets

Critical resources are automatically reserved after the user creates a new Function line item or changes the line item quantity and saves the record. Critical resources also are reserved when a Function line item for a critical asset is copied or when the service start time is changed. If booking is unsuccessful for a critical resource, the status is changed to Not Available or Not Enough Assets.

If changes are made to the function, such as a status change or a time change, then the asset inventory booking process is automatically started.

AutoBook and Noncritical Assets

Noncritical assets are reserved using the AutoBook functionality. When started, the AutoBook process attempts to book all line items listed for the function at the property where the event is being held for the specified function time.

The AutoBook process reserves the first available listed assets that meet the line item's quantity and time period specifications.

Using AutoBook, event and operations managers can first enter all the applicable noncritical Function line items and then click AutoBook to reserve all of the line items at one time.

After the initial entry, if line items are added or quantities changed, then the Inventory Status of the asset is changed to Not Booked. The sales representative must then restart the availability check using the AutoBook function. If the user deletes line items, then the item is automatically unbooked.

AutoBook can also be used in some instances to reserve critical resources. For example, the user might change the function time or service time and, as a result, the critical asset that is booked becomes unbooked. In this case the user can then rebook the critical asset by clicking AutoBook.

About Double-Booking and Rerenting of Assets

In some cases, a particular asset at a property is requested for more than one function scheduled for the same time. The first booking request successfully reserves the asset. An additional booking request fails to reserve the asset. If the inventory status for the desired item is Not Available, the user can choose to double-book the asset.

Alternatively, a product might have four assets at a property all of which are currently booked. However, the sales representative tries to book five assets but cannot because there are only four available at the property. In this case, the inventory status would be returned to the sales representative as Re-Rent, and in the Availability view, the sales representative can see that four of the assets are double booked, and that the fifth asset can be rerented.

When the Double Book/Re-rent button is clicked, a time-specific request (which means that the asset is booked at a specific time) is created for the asset. A double-book/rerent request does not, however, automatically result in an asset reservation for the second requestor if the first request is canceled. The user still has to select the Auto Book button for the change to be reflected at the line item level. In addition, there is no limit on the number of times an asset can be double-booked.

Note: Only critical and noncritical products can be double-booked. All types of products can be rerented.

When an asset is double-booked, the Inventory Status for the line item changes to Double Booked. When an asset is rerented, the status is changed to Re-rent. In the Function Line Item Availability view, the Scheduler shows two bars that represents the bookings, with the double-booked/rerented asset displayed in a different color. The Scheduler shows the times for which individual assets are reserved or double-booked/rerented and the identities of the users who have booked or double-booked/rerented those assets. This information can be useful if the second requestor wants to negotiate with the first requestor to determine whether or not the double-booked asset can be shared between the conflicting functions.

The following table describes the status values that occur when booking assets.

Status	Description
Booked	The asset is booked for the quote.
Not Available	The asset is booked for another quote and is not available.
Double Booked	At least one additional booking request exists for a booked asset.

Status	Description
	A status of double-booked can also signify a partial double booking. This status occurs when a line item with a multiple quantity is double-booked. For example, if an item with a quantity of 3 is requested and only two of the three assets are available, then the first two assets are booked and the third asset is double-booked. The status for the line item becomes Double Booked.
Re-Rent	All available assets have been double booked, so this asset must be re-rented from another property. There is a limit on the rerent of assets, in that a particular asset can only be flagged to be re-rented a maximum of 10 times. The limit of 10 can be changed through configuration in Siebel Tools. If the upper limit number of re-rents is exceeded for any asset, then the Inventory Status for the asset is changed to Not Enough Assets.
Not Enough Assets	The maximum number of re-rentable assets has been exceeded, and as a result, there are not enough assets available.

About Cluster Booking of Assets

In most cases, an event uses only those assets that are located at the property where the event is to occur. However, if the property does not have enough assets to satisfy the requirements of an event, that property can use the assets at another property that is located in the same property cluster. Siebel Hospitality allows sales representatives to add line items (that is, assets) that are located at other properties to the quote. This process is known as *cluster booking*.

When an asset has been added from a property in the cluster, this asset must can be AutoBooked, double-booked, or rerented in the same manner as assets that are located at the property. However, in this case, the assets are AutoBooked and double-booked using the Cluster AutoBook and Cluster Double Book options respectively, that are available from the Quote screen, Functions, Line Items view menu. For more information about AutoBooking, double-booking, and rerenting, see *AutoBook and Noncritical Assets* and *About Double-Booking and Rerenting of Assets*.

Process of Booking Hospitality Assets

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

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

1. *Defining the Inventory Status Colors*
2. *Reserving Critical and Noncritical Assets for Function Line Items*
3. *Reserving Cluster Assets for Function Line Items*
4. *Viewing Assets Associated with a Product*
5. *Viewing Asset Availability and Booking Information*

Defining the Inventory Status Colors

After creating assets for products, the user can specify a color scheme to define inventory status. Siebel Hospitality provides a predefined list of values (LOV) with default colors; a different color can be assigned to each asset status value such as Double Booked and Booked.

This task is a step in *Process of Booking Hospitality Assets*.

To define inventory status colors

1. Navigate to the Function Space Administration screen, then the Function Space Diary Administration view.
2. In the Inventory Color Schema list, click create a new record.
3. In the new record, select an inventory status, and assign a color to the status.

   Repeat this step to assign a color to each inventory status.

Reserving Critical and Noncritical Assets for Function Line Items

After function line items have been defined, you can book assets for the function line items. However, sometimes the asset is already booked for another function that occurs at the same time. In this case, you can double-book or rerent the asset.

This task is a step in *Process of Booking Hospitality Assets*.

This procedure details how to book assets that are located at the property where the function is to take place.

To reserve assets for function line items

1. Navigate to the Functions screen and query for the function.
2. In the Functions list, query for and select the required function, and click the link in the Function Name field.
3. In the Line Items list, click AutoBook to automatically assign available assets to the line items of the function.

   If the booking is successful, the Inventory Status field shows a status of Booked. For nonparticipating properties, Autobook can be used to switch between a status of Booked or Not Booked.
4. Review the Inventory Status field for each function line item to determine whether or not the line items were successfully booked and which line items require additional action such as overbooking.
5. Scroll down to the Assets list.

   This list displays the assets for the selected function line item, along with some information about the asset, including its status.

This procedure details how to double-book and re-rent assets. You cannot double-book or rerent assets for nonparticipating properties. For more information on double-booking and rerenting, see *About Hospitality Assets*.

To double-book or rerent assets for function line items

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for the required function record.
3. In the Function record, click the link in the Function Name field.
4. In the Line Items list, select a line item whose Inventory Status is one of the following:
   - Not Available. This status indicates that the asset must be double-booked.
   - Re-rent. This status indicates that the asset must be rerented.
5. Click Double Book/Re-rent.

Reserving Cluster Assets for Function Line Items

Before a sales representative can add cluster line items, property clusters must be set up, and properties must be added to these clusters. For more information, see *Process of Setting Up Property Clusters*.

Also, the cluster line item must be added to the quote function before it can be booked. For more information about adding a cluster line item, see *Adding Resource Cluster Line Items to a Quote*.

This task is a step in *Process of Booking Hospitality Assets*.

This procedure details how to start cluster booking for cluster line items assets.

To reserve cluster assets for function line items

1. Navigate to the Functions screen and query for the function.
2. In the Functions list, query for and select the required function, and click the link in the Function Name field.
3. In the Line Items list, select the required cluster line item.
4. In the Line Items menu, select Cluster AutoBook to automatically assign available assets to the line items of the function.

   If the booking is successful, the Inventory Status field shows a status of Booked. For nonparticipating properties, Autobook can be used to switch between a status of Booked or Not Booked.
5. Review the Inventory Status field for the cluster line item to determine whether or not the line items were successfully booked, and which line items require additional action such as overbooking.

This procedure details how to double-book and re-rent cluster assets. You cannot double-book or rerent cluster assets for nonparticipating properties. For more information on double-booking and rerenting, see *About Hospitality Assets*.

To double-book or rerent cluster assets for function line items

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for the required function record.
3. In the Function record, click the link in the Function Name field.
4. In the Line Items list, select a line item whose Inventory Status is one of the following:
   - Not Available. This status indicates that the asset must be double-booked.
   - Re-rent. This status indicates that the asset must be rerented.
5. From the Line Items menu, select Cluster Double Book.

Viewing Assets Associated with a Product

A user can view the assets associated with a specific hospitality product using the Function Line Items Assets view. You can view the assets for both property-specific products and products from other properties.

This task is a step in *Process of Booking Hospitality Assets*.

To view assets associated with a product

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for and select the required function.
3. Click the link in the Function Name field.
4. In the Line Items list, select the line item, and then click the Assets view tab to view the assets for a product at a particular property.

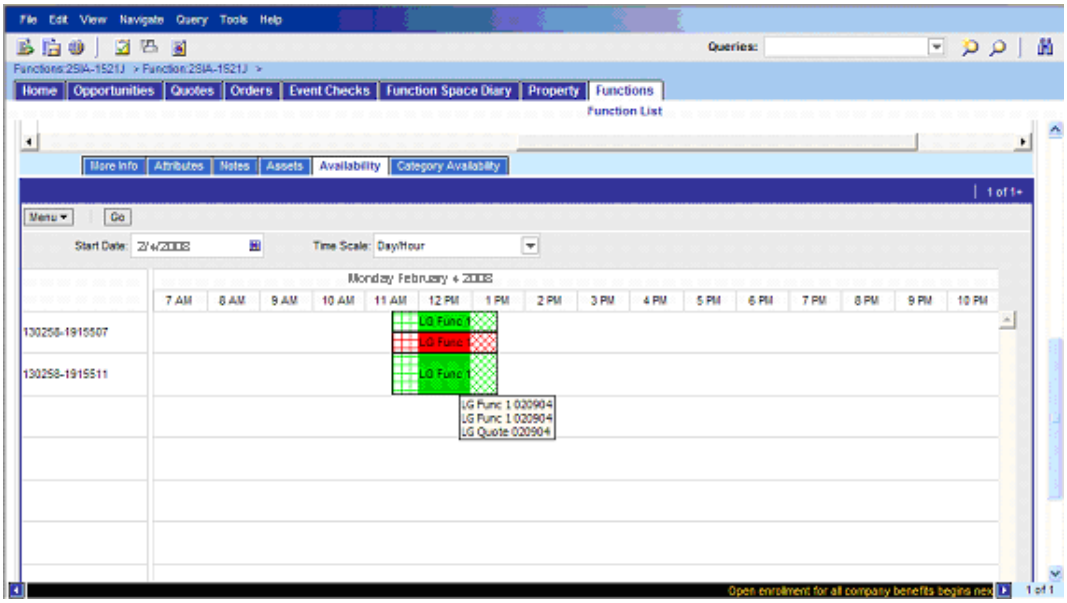
   The following table describes some of the fields in the asset record.

Field	Comments
Asset #	The asset identifier
Product	The product with which the asset is associated
Status	The asset inventory status
Installed	The date the asset was installed
Serial #	The asset serial number

Viewing Asset Availability and Booking Information

A user can view the availability of assets associated with a specific hospitality product and asset booking information using the Function Line Items Availability and Category Availability views. It is possible to view the availability and booking information for both assets available at your property and also assets that have been booked from properties in your cluster. Scheduler charts in these views are read-only, but users can change the time axis by selecting a different time scale and start date and then clicking Go.

In the following image, the highlighted box represents an asset that is double-booked. By positioning the mouse pointer over the highlighted area, users can view information about the quote and function, and the asset availability start and end times.



If the catering product that the user is trying to reserve is already booked, the user can attempt to negotiate with the user who is holding the asset booking or try to find an alternative asset that meets the criteria.

Determining Who Has Reserved an Asset

Use the Availability Gantt chart to determine who holds the booking for an asset.

This task is a step in *Process of Booking Hospitality Assets*.

To determine who has reserved an asset

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for and select the required function.
3. In the Function record, click the link in the function Name field.
4. In the Function Line Items list, select the required line item.
5. Scroll down and click the Assets view tab.
6. In the Assets list, select the asset, and note the asset number.
7. Click the Availability view tab to display a Scheduler chart that shows the available assets for the selected inventory.
8. Locate the asset using the asset number that you noted earlier in this procedure, and select the day and time period for the reservation.
9. Position the mouse cursor over the highlighted area in the asset record.

   The asset record shows the existing reservation's Quote Name, starting and ending date and times, and the setup and tear-down time.
10. Contact the owner of the booked asset, and determine if the asset can be shared.

Locating Substitute Assets

Using the Category Availability Gantt chart, users can locate an unreserved asset that can be substituted for an asset that is already booked.

The Category Availability chart shows the assets that are associated with a particular product and other products that belong to the same subcategory as the selected product. The chart also shows who has booked the assets. This form of display helps users to compare and contrast availability of products within the same category.

The user can position the mouse pointer over the assets on the y-axis and see the product details, description, subcategory, category, and product resource type.

This task is a step in *Process of Booking Hospitality Assets*.

To locate a substitute asset

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for and select the required function.
3. In the Function record, click the link in the function Name field.
4. Click the Line Items view tab.
5. In the Line Items list, select the line item.
6. Scroll down and click the Assets view tab.
7. In the Assets list, select the asset, and note the asset identifier.
8. Click the Category Availability view tab to display a Scheduler chart that shows similar products according to category and subcategory.
9. In the chart, position the mouse pointer over the asset that you noted earlier in this procedure to view details.

21 Managing Property-Specific Menus and Packages

Managing Property-Specific Menus and Packages

This chapter describes how to manage property-specific menus and packages. It includes the following topics:

- *About Managing Menus and Packages*
- *Process of Associating Menus and Packages with Functions*
- *Process of Managing Menus and Packages*
- *Revenue Estimate Examples for Menus and Packages*
- *Menu and Package Types Reference*

About Managing Menus and Packages

A *menu* is a grouping of Food and Beverage (F&B) items that can be sold together but will have an individual price attached to each item. A menu can include *only* F&B items. A menu can be a fixed-price menu that costs the same regardless of items selected, or a variable-price menu that depends on the items selected. A variable-price menu can include alternate choices with different prices; for example, a salmon entree for U.S. $24.95 or a prime rib entree for U.S. $29.95. In this case, the price for each person will vary depending on the individual selections.

A *package* is a grouping of items that can include menus, individual F&B items, individual non-F&B items, BEO (Banquet Event Order) items, and other packages. A package is sold as a unit for a set price; individual component items do not have individual prices. A package can have one overall price or a separate price for each person.

Several special types of menus and packages exist in Siebel Hospitality, as follows:

- **Menu Per Person.** This menu type provides for one menu for each person. This type can be a *set menu*, which is a menu with a fixed price for each person, or a *split menu*, which is a menu with a variable price for each person depending on the items selected.
- **Package Per Person.** This package type provides a fixed price for each person where individual item prices are not broken out.
- **Package Each.** This package type provides a fixed price for a quantity of 1 of the package, regardless of the number of people.
- **Package Item Price.** This package type provides a variable price for each person where individual item prices are broken out.

Menus and packages of these types are property-specific; that is, they are associated with a particular property, and are not generally available throughout the Siebel Hospitality system. If your access to Siebel Hospitality includes access to a property, you can see and work with the menus and packages associated with that property. Menus and packages can be associated with multiple properties through a *property cluster*, which is a group of properties that are linked to each other in the Siebel system. If your access to Siebel Hospitality includes access to a property cluster, you can see and work with menus and packages associated with all the properties in that cluster.

These types of menus and packages define how menus and packages are priced. Menu and package types also define the behaviors and calculations of multiple fields in parent menus, parent packages, and their child items. For more information about menus and packages pricing, see *Types of Menus and Packages*. For more information about menus and packages field behaviors and calculations, see *Menu and Package Types Reference*.

As a property manager or booking agent, you are responsible for managing property-specific menus and packages. You can add pre-structured menus and packages to functions that are associated with quotes and orders. You can modify menus, packages, menu and package product line items, and menu and package price line items. You can substitute products if the primary selected product runs out. You can create new menus and packages from component products. You can also track sales statistics for menus and packages.

Process of Associating Menus and Packages with Functions

This topic lists the tasks typically performed by property managers and booking agents to associate property-specific menus and packages with specific functions. Your company might follow a different process according to its business requirements.

To associate property-specific menus and packages with functions, perform the following procedures:

1. *Displaying Quote and Order Functions*
2. *Adding Menu and Package Line Items to a Function*
3. *Adding Menu and Package Line Items to Event Checks*

Displaying Quote and Order Functions

You add menus and packages to functions as function line items. A function can be associated with a quote or order. You can access functions associated with specific quotes from the Quotes screen. You can access functions associated with specific orders from the Orders screen. For more information about functions associated with quotes, see *Managing Functions Associated with Quotes*. For more information about functions associated with orders, see *Creating Function Orders*.

> **Note:** You can also add a menu, package, menu item, or event order item to an event check as a line item and associate it with a function. For more information, see *Adding Menu and Package Line Items to Event Checks*.

This task is a step in *Process of Associating Menus and Packages with Functions*.

To display quote functions

1. Navigate to the Quotes screen, then the List view.
2. Identify a quote that includes the function to which to add a menu or package.
3. Drill down on the Name field.
4. Click the Functions view tab.

To display order functions

1. Navigate to the Orders screen, then the Event Order view.
2. Identify an order that includes the function to which to add a menu or package.

3. Drill down on the Name field.
4. Click the Functions view tab.

Adding Menu and Package Line Items to a Function

You add a menu, package, menu item, or event order item to a function by associating it with the function as a function line item. You can do this in several ways, as described in the following table and in subsequent procedures in this topic.

To add a line item by:	Follow this procedure:
Selecting a single product from a list of available products.	To add line items to a function with the New button
Selecting multiple products from a list of available products.	To add line items to a function with the Add Items button
Selecting one or more products from a list of products you create from filter criteria.	To add line items to a function with the Search form
Adding a single product by specifying the Product Code, Product Name, or Display Name of the product.	To add line items to a function with the Quick Add form

This task is a step in *Process of Associating Menus and Packages with Functions*.

To add line items to a function with the New button

1. Display a list of functions associated with quotes or orders.

   For more information about functions associated with quotes or orders, see *Displaying Quote and Order Functions*.
2. In the Function list, select the function to which to add a menu or package.
3. Click the Line Items subview tab.
4. In the Line Items list, click New.
5. In the new record, click the multiple select button of the Item field.
6. In the Pick Line Item dialog box, do the following:
   a. In the Type field, select one of the menu or package types listed in the table that follows and click Go.

Type	Comments
Menu Per Person	One menu for each person. The price can be a fixed price for each person, or a variable price for each person depending on the items selected.
Package Each	Fixed price for a quantity of 1 of the package, regardless of the number of people.

Type	Comments
Package Item Price	Variable price for each person where individual item prices are broken out.
Package Per Person	Fixed price for each person where individual item prices are not broken out.

b. In the resulting list, select a menu or package record to add to the function and click OK.

The menu or package record appears in the Line Items list. If the menu or package has associated child products, it displays a folder icon.

7. To view the component child items of the menu or package, expand the folder.

To add line items to a function with the Add Items button

1. Display a list of functions associated with quotes or orders.

   For more information about functions associated with quotes or orders, see *Displaying Quote and Order Functions*.
2. In the Function list, select the function to which to add line items.
3. Click the Line Items subview tab.
4. In the line items list, click Add Items.

   Siebel Hospitality displays the Pick Products dialog box.
5. In the Pick Products dialog box, do the following:

   a. Identify and select each product to add as a line item by entering a value in the Order Qty field of the product.
   b. Click Add.

      The products you selected appear in the list in the lower part of the dialog box.
   c. Click OK.

   Siebel Hospitality displays the Function Line Items view with the products you selected added as line items.

To add line items to a function with the Search form

1. Display a list of functions associated with quotes or orders.

   For more information about functions associated with quotes or orders, see *Displaying Quote and Order Functions*.
2. In the Function list, select the function to which to add line items.
3. Click the Line Items subview tab.
4. Scroll down to the end of the screen.
5. In the Search form, enter criteria for the products to add to the current function as line items and click Search.

   The products that match your criteria appear in the Results list after the Search form.
6. In the Results list, select the products to add as line items and click Add Item.

   Siebel Hospitality displays the Line Items list with the products you selected added as line items.

To add line items to a function with the Quick Add form

1. Display a list of functions associated with quotes or orders.

   For more information about functions associated with quotes or orders, see *Displaying Quote and Order Functions*.
2. In the Function list, select the function to which to add line items.
3. Click the Line Items subview tab.
4. Scroll down to the end of the screen.
5. In the Quick Add form, enter the Product Code, Product Name, or Display Name for the product to add to the current function as a line item.

   The products that match your criteria appear in the Results list after the Search form.
6. Click Add Item.

   Siebel Hospitality displays the Line Items list with the product you specified added as a line item.

Adding Menu and Package Line Items to Event Checks

You can add menus and packages to an event check as line items and associate these line items with specific functions. For more information about line items in event checks, see *Adding, Changing, and Recalculating Event Check Line Items*.

After you add a menu or package to a line item in an event check, you can:

- Edit the menu or package. For more information, see *Editing Function Menus, Packages, and Line Items*.
- Add products to the menu or package. For more information, see *Adding Product Line Items to a Menu or Package*.
- Substitute products in the menu or package. For more information, see *Substituting Products in a Menu or Package*.

However, you cannot create custom menus or packages for event check functions.

This task is a step in *Process of Associating Menus and Packages with Functions*.

To add a menu or package line item to an event check

1. Navigate to the Event Checks screen, Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check number (#) field, and then click the Functions view tab.
4. In the Functions list, select the function for which to add line items.
5. Scroll down to the Line Items list, and create a new record:

   a. In the Item field, select a menu or package.
   b. Complete the other fields, as required.

Process of Managing Menus and Packages

This topic lists the tasks typically performed by property managers and booking agents when managing property-specific menus and packages for a function. Your company might follow a different process according to its business requirements.

To manage property-specific menus and packages for a function, perform the following procedures:

- *Editing Function Menus, Packages, and Line Items*
- *Adding Product Line Items to a Menu or Package*
- *Creating a Custom Menu or Package for a Function*
- *Automatically Calculating Allocations for Packages*
- *Displaying Menu or Package Revenue Estimates*
- *Substituting Products in a Menu or Package*
- *Looking Up How Many Times a Menu Was Sold*

Editing Function Menus, Packages, and Line Items

You can modify the details of menus, packages, and their child product items that are associated with functions.

This task is a step in *Process of Associating Menus and Packages with Functions*.

To edit a function menu or package and line items

1. Display a list of functions associated with quotes or orders.

   For more information about functions associated with quotes or orders, see *Displaying Quote and Order Functions*.
2. In the Function list, select the function in which to edit a menu or package.
3. Click the Line Items subview tab.
4. In the line items list, select the menu, package, or component product to edit.
5. Change the values of the fields as required. Some fields are described in the table that follows.

   > **Note:** The behaviors and calculations of many fields are affected by the menu or package type. For more information about field calculations and behaviors in the various types of menus and packages, see *Menu and Package Types Reference*.

Field	Comments
Item	Shows an Explorer-type hierarchy. For a single item, displays a document icon. For a menu or package with child items, displays a folder icon. When you add a menu or package as a line item, the whole hierarchy is added and becomes visible. Available selection changes dynamically with the value in the Grouping field. If you try to edit or replace a child item within a menu or package, the Pick Line Item dialog box displays only the items with the same Grouping as the selected menu or package child

Field	Comments
	item. However, if you click Show All Products, the Pick Line Item dialog box displays one of the following lists: o If the parent of the selected child item is a package, the Pick Line Item dialog box displays all the items associated with the current property irrespective of their Grouping values. o If the parent of the selected child item is a menu, the Pick Line Item dialog box displays all the menu items associated with current property, irrespective of their Grouping values.
Product Type	Read only. Type of menu or package. Determines the pricing method. o **Menu Per Person.** One menu for each person. The price can be a fixed price for each person, or a variable price for each person depending on the items selected. o **Package Each.** Fixed price for a quantity of 1 of the package, regardless of the number of people. o **Package Item Price.** Variable price for each person where individual item prices are broken out. o **Package Per Person.** Fixed price for each person where individual item prices are not broken out.
Grouping	Read only. Identifies related groups of products. Allows you to do searches for products classified by related groups. For example, Dinner could be a menu grouping, and this would help you to find all the dinner menus that are available in a property.
Resource Type	Read only. Possible values are as follows: o **Critical.** Item is necessary for an event to occur. The application tries to reserve this item when a quote is created. o **General.** Item is noncritical; that is, not necessary for an event to occur. o **Non Critical.** Item is noncritical; that is, not necessary for an event to occur.
Qty	How many products are included in this line item.
Extended Quantity	Displays the same value as Qty for parent and static child line items. Calculated for per person child line items. The calculation is parent quantity multiplied by child quantity. The default value of Extended Quantity for a Package Per Person or a Menu Per Person is generated by the value of Best Attendance. For example, when you add a menu per person to a function that has 50 expected attendees, the default value of Extended Quantity for the menu per person is 50. For more information about Best Attendance, see *Best Attendance Field*.
Negotiated Price	Price for this line item that has been negotiated with the customer, if different from the List Price. Can be a discounted price. The presence of both this field and the Discount Amount field allow you to specify both a discounted price and an amount for a discount, independently of each other, if required.

Field	Comments
	Editable for line items that have prices, null and read only for fields that do not have prices. For example, in a Package Per Person, the child items are not priced but the parent package is priced. Therefore, in the child items, this field is read only, but in the parent package, this field editable.
Discount Amount	Amount of any discount that can apply to this product. You can specify a Discount Amount or a Discount %, but not both for the same item. If Discount Amount is specified, Discount % is null. The presence of both this field and the Negotiated Price field allow you to specify both a discounted price and an amount for a discount, independently of each other, if required.
Discount %	Percent of the discount to be applied to a line item price. You can specify a Discount % or a Discount Amount, but not both for the same item. If Discount % is specified, Discount Amount is null.
Unit Net Price	Calculated from the Negotiated Price or the List Price. If the Negotiated Price is null, the calculation is one of the following: o List Price minus (List Price multiplied by Discount %) o ist Price minus Discount Amount If the Negotiated Price is not null, the calculation is one of the following: o Negotiated Price minus (Negotiated Price multiplied by Discount %) o egotiated Price minus Discount Amount
Extended Net Price	Calculated. Displays the Unit Net Price multiplied by the Extended Quantity.
Fixed	Read only. If selected, you cannot add new items to, alter the structure of, or change the quantities of the menu or package.
Per Person Allocation	Amount of revenue per person to allocate to a related revenue subcategory. Read only and null for a Package Per Person, Package Each, or Package Item Price. For more information about allocations, see *Revenue Allocations for Menus and Packages*.
Split Pricing	Applies to menus only. If selected, indicates a split menu. If the Split Pricing check box of any child menu item is selected, the Split Pricing check box of the parent item is automatically selected. Read only at the parent menu level. Editable at the child item level.
Service Charge Inclusive	If selected, the service charge is included in the List Price. If cleared, the List Price does not include the service charge.

Field	Comments
Tax Inclusive	If selected, tax is included in the List Price. If cleared, the List Price does not include tax.
Substitutes	Allows you to select from a list of products that can be substituted for the current product, if specified by the administrator. Selecting a substitute product in this field might update other fields in this line item with information from the substitute product record.
Recommendation Message	Read only. Message that you can use to influence a customer to buy the product. For example, if the product is an entree, this field might specify a wine that is compatible.

6. To edit a child item in a menu or package, expand the folder icon in the Item field, and repeat Step 4 through Step 5.

Adding Product Line Items to a Menu or Package

You can add more child product items to a menu or package that is associated with a quote or an order.

This task is a step in *Process of Associating Menus and Packages with Functions*.

To add a product line item to a menu or package

1. Display a list of functions associated with quotes or orders.

   For more information about functions associated with quotes or orders, see *Displaying Quote and Order Functions*.
2. In the Function list, select the function that contains the menu or package to which to add child items.
3. Click the Line Items subview tab.
4. In the line items list, identify the parent menu or package to which to add child items.
5. In the line items list, select a child item of the parent menu or package to which to add child items.
6. Click New.
7. In the new record, click the multiple select button of the Item field.

   The Pick Line Item dialog box appears.
8. In the Pick Line Item dialog box, do one of the following:
   - If the parent record is a package, in the Type field, select one of the product types listed in the table that follows and click Go.

Type	Comments
Event Order Item	Non-F&B-related simple products.
Menu Item	F&B-related simple products.

Type	Comments
Menu Per Person	Menus that provide one menu for each person.
Package Each	Packages with a fixed price for a quantity of 1 of the package, regardless of the number of people.
Package Item Price	Packages with a variable price for each person where individual item prices are broken out.
Package Per Person	Packages with a fixed price for each person where individual item prices are not broken out.

- If the parent record is a menu, in the Type field, select Menu Item and click Go.

9. In the resulting list, select the item to add to the selected menu or package and click OK.

   Another child item is added to the parent menu or package of the currently selected child item.

   For example, suppose a parent package named Decor Package has a Centerpiece child item. When you select Centerpiece and click New, the new item is added as a child item of the Decor Package.

Creating a Custom Menu or Package for a Function

In addition to adding existing menus and packages as function line items, and modifying them as necessary, you can create entirely new menus and packages in the Function Line Items views. Menus and packages created in this way will not be available to all functions associated with the current property, but only to the specific function in which you create them.

This task is a step in *Process of Associating Menus and Packages with Functions*.

To create a custom menu or package for a function

1. Display a list of functions associated with quotes or orders.

   For more information about functions associated with quotes or orders, see *Displaying Quote and Order Functions*.
2. In the Function list, select the function in which to create a custom menu or package.
3. Click the Line Items subview tab.
4. On the Line Items tab, click Menu and choose Create Custom Menu/Package.
5. In the Create Custom Menu/Package dialog box, complete the fields. Some fields are shown in the table that follows.

Field	Comments
Type	Type of menu or package to create. ○ **Menu Per Person.** One menu for each person. The price can be a fixed price for each person, or a variable price for each person depending on the items selected. ○ **Package Per Person.** Fixed price for each person where individual item prices are not broken out. ○ **Package Each.** Fixed price for a quantity of 1 of the package, regardless of the number of people. ○ **Package Item Price.** Variable price for each person where individual item prices are broken out.
Number of Items	Number of child items to be included in the menu or package.

6. Click OK.

   Siebel Hospitality redisplays the Line Items list with the parent menu or package item and its child items that you specified.
7. In each of the new line items, complete the fields as required.

   For descriptions of some fields in the Function Line Items views, see *Editing Function Menus, Packages, and Line Items*.

Automatically Calculating Allocations for Packages

You can have Siebel Hospitality automatically set per person allocations for packages. Siebel Hospitality distributes allocations according to revenue contribution percentages calculated from list prices. You can then manually update these automatically calculated per person allocations at any time. You can also overwrite any existing allocations with the allocations.

The allocations calculation functionality is disabled under the following conditions:

- A parent package record is not selected.
- The selected package is or contains a package of the type Package Item Price.
- The selected package contains a split menu.

For more information about revenue allocations and the calculations that Siebel Hospitality performs, see *Revenue Allocations for Menus and Packages*.

This task is a step in *Process of Associating Menus and Packages with Functions*.

To automatically calculate allocations for a package

1. Display a list of functions associated with quotes or orders.

   For more information, see *Displaying Quote and Order Functions*.
2. In the Function list, select the function in which to set automatic allocations for a package.
3. Click the Line Items subview tab.
4. In the line items list, select the package for which to set automatic allocations.

5. Click Menu and choose Set System Allocation.

   Siebel Hospitality calculates the allocations and updates the appropriate fields in the line item. A per person allocation is calculated for each child item from the unit net price of the parent item. The formula is as follows:

   (total of the child item unit net prices) divided by (unit net price of the child item) multiplied by parent package unit net price
6. Click Menu and choose Validate Allocation.

   Siebel Hospitality verifies that the cumulative sum of per person allocations equals the ultimate parent package's unit net price.

Displaying Menu or Package Revenue Estimates

Siebel Hospitality can display an estimate of how much revenue a menu or package associated with a function will yield, and how much revenue each child item will contribute. For more information about displaying revenue estimates, see *Reviewing Revenue Estimates for Quote Functions*.

Siebel Hospitality performs revenue calculations as follows:

- **Simple products.** The revenue estimate is based on the extended net price.
- **Menus without split items.** The revenue estimate is based on the extended net price.
- **Split menus.** The revenue is calculated only for the split menu items, according to their respective extended net prices.
- **Packages.** The revenue is calculated for the child package items from the per person allocation multiplied by the extended quantity of the root (ultimate parent) package.

For examples of revenue estimate calculations, see *Revenue Estimate Examples for Menus and Packages*.

This task is a step in *Process of Associating Menus and Packages with Functions*.

Substituting Products in a Menu or Package

You can view and select all products that are available as substitutes for the child items in a menu or package.

This task is a step in *Process of Associating Menus and Packages with Functions*.

To substitute a product in a menu or package

1. Navigate to the Functions screen, then the Function List view.
2. In the Function list, select the function with the menu or package whose products you want to substitute.
3. Click the Line Items view tab.
4. In the line items list, select the child product of the menu or package for which to substitute another product.
5. Click the Substitute Products subview tab.

   If substitute products are available for this product, Siebel Hospitality displays them in the Substitute Products list.
6. Select an item to substitute for the selected Line Items list item and click Substitute.

   The record you selected in the Substitutes list replaces the current function line item.

> **Note:** If the Fixed check box of the current package or menu is selected, or if no substitutes are available for the selected item, the Substitute button is disabled.

Looking Up How Many Times a Menu Was Sold

You can look up how many times a menu has been sold to your customers. For example, you might want to know how many times Spring Wedding menu has been sold at your property. Depending on the findings, you might delete or modify the Spring Wedding menu.

This task is a step in *Process of Associating Menus and Packages with Functions*.

To look up how many times a menu was sold

1. Display a list of functions associated with quotes.

   For more information, see *To display quote functions*.
2. In the Function list, select the function associated with the menu whose sales numbers you want to look up.
3. Click the Line Items subview tab.
4. In the line items list, select the menu for which you want to look up how many times it has been sold.
5. Click Menu Match.

   Siebel Hospitality displays the Category Line Items list, which is filtered by the field value criteria shown in the table that follows.

Field	Criteria
Product Type	Menu Per Person or Menu Item
Function Date	Date of the function from which you have navigated
Parent Quote Property	Property associated with the quote from which you have navigated

   The Category Line Items list displays all the menus and menu items that have been sold on that day, and their quantities. For example, if the day of the current function is 1/1/10, the list shows all the menus and menu items for all the functions that occur on 1/1/10.

Revenue Estimate Examples for Menus and Packages

The examples in this topic illustrate several system-calculated revenue estimates, as follows:

- *Example Package Per Person or Package Each Revenue Estimate*
- *Example Package Item Price Revenue Estimate*

- *Example Menu Per Person Set Price Revenue Estimate*
- *Example Menu Per Person Split Price Revenue Estimate*

Example Package Per Person or Package Each Revenue Estimate

In this example, the ultimate parent package is a Package Per Person or a Package Each. This ultimate parent package has a unit net price of $75. You must manually set the per person allocations of the child items to equal $75. The quantity of each child item is irrelevant to the revenue estimating process. The line item details of this example are shown in the following table.

Level 1	Level 2	Level 3	Unit Net Price	Ext Net Price	Qty	Extended Qty	Per Person Allocation	Revenue Category	Revenue Estimate
Package 1	N/A	N/A	75.00	375.00	1	5	N/A	N/A	N/A
Package 1	Event Order Item 1	N/A	N/A	N/A	10	10	20.00	Audio-visual	100.00
Package 1	Event Order Item 2	N/A	N/A	N/A	1	1	10.00	Audio-visual	50.00
Package 1	Event Order Item 3	N/A	N/A	N/A	1	1	30.00	Rental	150.00
Package 1	Package 2	N/A	N/A	N/A	2	2	N/A	N/A	N/A
Package 1	Package 2	Event Order Item 4	N/A	N/A	2	4	5.00	Food	25.00
Package 1	Package 2	Event Order Item 5	N/A	N/A	1	2	10.00	Audio-visual	50.00

The revenue estimates for the various revenue categories are outlined in the following table.

Revenue Categories	Revenue Estimate
Audiovisual	200.00
Rental	150.00
Food	25.00

Example Package Item Price Revenue Estimate

In this example, the ultimate parent package is a package item price. Siebel Hospitality does pricing and revenue estimating on each child item individually and ignores the parent package item price. The line item details of this example are displayed in the following table.

Level 1	Level 2	Level 3	Unit Net Price	Ext Net Price	Qty	Extended Qty	Per Person Allocation	Revenue Category	Revenue Estimate
Package 1	N/A	N/A	N/A	N/A	1	1	N/A	N/A	N/A
Package 1	Event Order Item 1	N/A	5.00	50.00	10	10	N/A	Audio-visual	50.00
Package 1	Menu	N/A	5.00	100.00	20	20	N/A	Food	100.00
Package 1	Menu	Menu Item 1	N/A	N/A	1	20	N/A	N/A	N/A
Package 1	Menu	Menu Item 2	N/A	N/A	1	20	N/A	N/A	N/A
Package 1	Package 2	N/A	50.00	100.00	2	2	N/A	N/A	N/A
Package 1	Package 2	Event Order Item 2	N/A	N/A	2	4	40.00	Food	80.00
Package 1	Package 2	Event Order Item 1	N/A	N/A	1	2	10.00	Food	20.00

The revenue estimates for the various revenue categories are shown in the following table.

Revenue Categories	Revenue Estimates
Audiovisual	50.00
Rental	0
Food	200.00

Revenue Categories	Revenue Estimates

Example Menu Per Person Set Price Revenue Estimate

In this example, the parent package is a set price menu. The menu has a price and a revenue category. There are no per person allocations. The revenue estimate equals the extended net price of the menu. The line item details of this example are displayed in the following table.

Note: If the menu is a child item of a Package Each or a Package per Person, it might have a per person allocation. In this case, the revenue estimate is based on the per person allocation.

Level 1	Level 2	Extended Net Price	Qty	Extended Qty	Per Person Allocation	Revenue Category	Revenue Estimate
Set Menu	N/A	100.00	1	20	N/A	Food	100.00
Set Menu	Menu Item 1	N/A	1	20	N/A	N/A	N/A
Set Menu	Menu Item 2	N/A	1	20	N/A	N/A	N/A

The revenue estimates for the various revenue categories are shown in the following table.

Revenue Categories	Revenue Estimates
Audiovisual	0
Rental	0
Food	100.00

Example Menu Per Person Split Price Revenue Estimate

In this example, the parent package is a split price menu. The price of the menu depends on the selections the customer makes. Here the customer can either choose Menu Item 1 or Menu Item 2. Each item has a price and a revenue category. The revenue estimate is equal to the extended net price of the split items. The line item details of this example are shown in the following table.

Level 1	Level 2	Split	Split Price	Extended Price	Qty	Extended Qty	Per Person Allocation	Revenue Category	Revenue Estimate
Split Menu	N/A	N/A	N/A	N/A	1	1	N/A	N/A	N/A
Split Menu	Menu Item 1	Yes	50.00	1000.00	20	20	N/A	Food	1000.00
Split Menu	Menu Item 2	Yes	40.00	1200.00	30	30	N/A	Food	1200.00

The revenue estimates for the various revenue categories are listed in the following table.

Revenue Categories	Revenue Estimates
Audiovisual	0
Rental	0
Food	2200.00

Menu and Package Types Reference

The following topics provide examples and details of the various types of property-specific menus and packages, as follows:

- *Package Per Person Reference*
- *Package Item Price Reference*
- *Package Each Reference*
- *Menu Per Person, Set Price Reference*
- *Menu Per Person, Split Price Reference*

Package Per Person Reference

A Package Per Person provides a method of mixing different types of items, such as a Package Each and a Per Person, into one package. In this way, a Package Per Person can show a realistic representation of child menus or packages broken into a per person basis, while taking into account static price items.

Example of a Package Per Person

In a Package Per Person, the Unit Net Price, Extended Price, Negotiated Price, Discount %, and Net Discount values apply only to the parent package. For child items, these values are not displayed and the fields are read only.

The following table shows an example of a package per person with an expected quantity of 50. In the table, Extended Quantity is the calculated rollup.

Parent	Child	Quantity	Extended Quantity	List Price	UOM	Unit Net Price	Extended Price	Negotiated Price	Discount %	Net Discount	Pe Al
Package	N/A	50	50	60.00	Per Person	60.00	3000.00	0	0	0	N/
Package	Menu	1	50	50.00	Per Person	N/A	N/A	N/A	N/A	N/A	30
Package	Audio-visual	1	1	400.00	Each	N/A	N/A	N/A	N/A	N/A	15.
Package	Ice Sculp-ture	2	2	100.00	Each	N/A	N/A	N/A	N/A	N/A	15.

Package Per Person Field Behaviors

This topic describes the behaviors and internal calculations that Siebel Hospitality performs for selected fields in a Package Per Person and its child items. These behaviors are typical of the Package Per Person package type.

Quantity Field

For the parent package, set to the # Guaranteed or Expected, in that order, when either of these fields is changed. If Guaranteed is null, Expected is used. For child items, the default value is set up by the administrator.

Extended Quantity Field

For the parent package and static child items, displays the same value as Quantity. For each child line item that is a per person item (that is, where UoM is equal to Person), Extended Quantity is calculated as parent Quantity multiplied by child item Quantity, where parent Quantity is equal to Best Attendance. For the parent package and static child line items, this calculation is not done and the Extended Quantity is the same as Quantity.

The Quantity of the parent item and of the child items can also be manually modified. If the parent is a package per person, the parent Quantity behaves as if the UoM is equal to Per Person even if this is not explicitly specified on the parent record.

Using example values from the table in *Example of a Package Per Person*, the Extended Quantity is calculated as shown in the following table.

Parent	Child	UOM	Quantity	Calculation	Extended Quantity
Package	N/A	Per Person	50	50	50
Package	Menu	Per Person	1	1 multiplied by 50	50
Package	Audiovisual	Each	1	1 multiplied by 1	1

Parent	Child	UOM	Quantity	Calculation	Extended Quantity
Package	Ice Sculpture	Each	2	2 multiplied by 1	2

Best Attendance Field

If Actual is not null, Best Attendance is equal to Actual. If Actual is null and Guaranteed is not null, Best Attendance is equal to Guaranteed. If Actual and Guaranteed are both null and Projected is not null, Best Attendance is equal to Projected. If Actual, Guaranteed, and Projected are all null, Best Attendance is equal to Expected.

Unit Net Price Field

Unit Net Price is calculated as follows:

If Negotiated Price is null, the calculation is one of the following:

- List Price minus (List Price multiplied by Discount %)
- List Price minus Discount Amount

If Negotiated Price is not null, the calculation is one of the following:

- Negotiated Price minus (Negotiated Price multiplied by Discount %)
- Negotiated Price minus Discount Amount

Extended Net Price Field

Extended Net Price is calculated as Extended Quantity multiplied by Unit Net Price for both the parent package and the child line items.

Using example values from the table in *Example of a Package Per Person*, the Extended Price is calculated as shown in the following table.

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Price
Package	N/A	50	60.00	50 multiplied by 60	$3000.00
Package	Menu	50	50.00	50 multiplied by 50	$2500.00
Package	Audiovisual	1	400.00	1 multiplied by 400	$400.00
Package	Ice Sculpture	2	100.00	2 multiplied by 100	$200.00

Discount % Field

Percent of the discount to be applied to a line item price. You can specify a Discount % or a Discount Amount, but not both for the same item. If Discount % is specified, Discount Amount is null.

Discount Amount Field

Amount of the discount to be applied to a line item price. You can specify a Discount % or a Discount Amount, but not both for the same item. If Discount Amount is specified, Discount % is null.

Non Discounted Extended Price Field

If Negotiated Price is null, the value is calculated as List Price multiplied by Extended Qty. If Negotiated Price is not null, the value is calculated as Negotiated Price multiplied by Extended Qty.

Net Discount Field

The value is calculated as Non Discounted Extended Price minus Extended Net Price.

Per Person Allocation Field

For the parent package, this field is read-only and null, because allocations are normally calculated for the child records. For a per person child item, holds the allocated value of the revenue from that item. For child items, the default value is the allocations value defined by the administrator. For the package, the value equals the Net Price. Users can update the Per Person Allocation fields of the child items.

CAUTION: When a discount is applied to a package, the List Price will not equal the Net Price, so these numbers must be manually adjusted to make sure the child item allocations add up to the Allocated value for the package.

Function Total Field

The Function Total field is located in the function record, and shows total value of the function. The value in this field includes the extended net prices of the parent package and does not include the extended net prices of the child package items.

Package Item Price Reference

In a Package Item Price, pricing occurs on a unit basis. The Total Header Price is not displayed on the Event Order Report or in the Siebel Hospitality UI. The child line item prices are displayed on the BEO Report. Discounts are applied to individual child line items, and their net results will be displayed through the Unit Net Price.

Example of a Package Item Price

A typical example of an item price package is a Cash Bar. As shown in the following table, the Unit Net Price, Extended Price, Discount %, Net Discount, and Per Person Allocation fields are Null and read-only for the parent package. These fields apply only to the child line items.

Parent	Child	Quantity	Extended Quantity	List Price	UOM	Unit Net Price	Extended Price	Discount %	Net Discount	Per Person Allocation
Package	N/A	1	1	N/A	Each	N/A	N/A	N/A	N/A	N/A
Package	Beer	1	1	5	Each	5.00	5.00	0%	0	N/A

Parent	Child	Quantity	Extended Quantity	List Price	UOM	Unit Net Price	Extended Price	Discount %	Net Discount	Per Person Allocation
Package	Wine	1	1	10	Each	10.00	5.00	50%	5.00	N/A
Package	Cordials	1	1	3	Each	3.00	3.00	0%	0	N/A

Package Item Price Field Behaviors

This topic describes the behaviors and the internal calculations that Siebel Hospitality performs for selected fields in a Package Item Price and its child items. These behaviors are typical of the Package Item Price package type.

Extended Quantity Field

Because only static child line items exist in a Package Item Price package, the Extended Quantity for the parent package equals the Quantity. The Extended Quantity for a child line item is calculated as Parent Quantity multiplied by Child Quantity.

Using values from the table in *Example of a Package Item Price*, the Extended Quantities are calculated as shown in the following table.

Parent	Child	Quantity	Extended Quantity
Cash Bar	N/A	1	1
Cash Bar	Beer	1	1
Cash Bar	Wine	1	1
Cash Bar	Cordials	1	1

If the parent package quantity is 4, the Extended Quantities are calculated as shown in the following table.

Parent	Child	Quantity	Extended Quantity
Cash Bar	N/A	4	4
Cash Bar	Beer	1	4
Cash Bar	Wine	1	4
Cash Bar	Cordials	1	4

For a child item that is a complex product with UoM is equal to Per Person under the Package Item Price and # of Attendees is equal to 30, the Extended Quantities are calculated as shown in the following table.

Parent	Child	Grandchild	Quantity	Extended Quantity
Cash Bar	N/A	N/A	1	1
Cash Bar	Menu Per Person	N/A	30	30
Cash Bar	Menu Per Person	Wine	1	30
Cash Bar	Menu Per Person	Chicken	1	30

Unit Net Price Field

For Package Item Price packages, the Unit Net Price calculation occurs only at the child item level. The Unit Net Price for a child line item is calculated as Parent Quantity multiplied by Child List Price.

Using values from the table in *Example of a Package Item Price*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	List Price	Quantity	Calculation	Unit Net Price
Cash Bar	N/A	N/A	1	N/A	$18.00
Cash Bar	Beer	$5.00	1	5 multiplied by 1	$5.00
Cash Bar	Wine	$10.00	1	10 multiplied by 1	$10.00
Cash Bar	Cordials	$3.00	1	3 multiplied by 1	$3.00

Extended Net Price Field

For Package Item Price packages, the Extended Net Price calculation occurs only on the child level. The Extended Net Price for a child line item is calculated as Child Extended Quantity multiplied by Child Unit Net Price.

Using values from the table in *Example of a Package Item Price*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Net Price
Cash Bar	N/A	1	N/A	N/A	N/A
Cash Bar	Beer	3	$5.00	3 multiplied by 5	$15.00

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Net Price
Cash Bar	Wine	1	$10.00	1 multiplied by 10	$10.00
Cash Bar	Cordials	1	$3.00	1 multiplied by 3	$3.00

Per Person Allocation Field

For Package Item Price packages, the Per Person Allocation calculation occurs only on the child level. A Per Person Allocation field of a child line item might or might not have a value, depending on the Product Type of the child line item.

For example, if the child item is a Menu, the Per Person Allocation field is not used. If, however, the child item is a Package Per Person, then the Per Person Allocation field of the child item follows the Package Per Person rules. That is, the total Per Person Allocation sums up to the Net Price of the Package Per Person.

Function Total Field

The Function Total field is located in the function record. This field shows the total value of the function. The Function Total field value includes the Extended Net Prices of the child items, but not the Extended Net Price of the parent package, which is null.

Package Each Reference

Package Each is the reverse of Package Item Price and similar to the Package Per Person. The Total Header Price is required, while the child line item prices do not roll up to the parent price. However, unlike the Package Per Person, all child line items of a Package Each must be of UoM is equal to Each.

Example of a Package Each

In a Package Each, the Unit Net Price, Extended Price, Negotiated Price, Discount %, and Net Discount values apply only to the parent package. For child items, these values are not displayed and the fields are read only.

The following table shows an example of a package each with an expected quantity of 10.

Parent	Child	Quantity	Extende Quantity	List Price	UOM	Negotiate Price	Discount %	Unit Net Price	Extende Net Price	Net Discount	Per Person Allocation
Package	N/A	20	20	160.00	Each	150.00	10%	$135.00	$2700.00	300.00	
Package	Speaker	1	20	50.00	Each	N/A	N/A	N/A	N/A	N/A	100.00
Package	Projector	1	20	70.00	Each	N/A	N/A	N/A	N/A	N/A	30.00
Package	Flip Chart	1	20	40.00	Each	N/A	N/A	N/A	N/A	N/A	5.00

Parent	Child	Quantity	Extended Quantity	List Price	UOM	Negotiated Price	Discount %	Unit Net Price	Extended Net Price	Net Discount	Per Person Allocation

Package Each Field Behaviors

This topic describes the behaviors and internal calculations that Siebel Hospitality performs for selected fields in a Package Each and its child items. These behaviors are typical of the Package Each package type.

Extended Quantity Field

Because only static child line items exist in an Package Each package, the Extended Quantity for the parent package equals the Quantity. However, in each child line item, the Extended Quantity equals Parent Quantity multiplied by Child Quantity.

Using values from the table in *Example of a Package Each*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	Quantity	Extended Quantity
Package	N/A	20	20
Package	Speaker	1	20
Package	Projector	1	20
Package	Flip Chart	1	20

Unit Net Price Field

Unit Net Price is calculated as follows:

If Negotiated Price is null, the calculation is one of the following:

- List Price minus (List Price multiplied by Discount %)
- List Price minus Discount Amount

If Negotiated Price is not null, the calculation is one of the following:

- Negotiated Price minus (Negotiated Price multiplied by Discount %)
- Negotiated Price minus Discount Amount

Using values from the table in *Example of a Package Each*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	List Price	Negotiated Price	Discount %	Calculation	Unit Net Price
Package	N/A	$160.00	150.00	10	150 minus 10%(150)	$135.00
Package	Speaker	$50.00	40.00	N/A	40	$40.00
Package	Projector	$70.00	N/A	N/A	70	$70.00
Package	Flip Chart	$40.00	30.00	N/A	40	$30.00

Extended Net Price Field

The Extended Net Price is calculated as Extended Quantity multiplied by Unit Net Price for both the parent package and the child line items.

Using values from the table in *Example of a Package Each*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Net Price
Package	N/A	20	$135.00	20 multiplied by 135	$2700.00
Package	Speaker	20	$40.00	20 multiplied by 40	$800.00
Package	Projector	20	$70.00	20 multiplied by 70	$1400.00
Package	Flip Chart	20	$30.00	20 multiplied by 30	$600.00

Per Person Allocation Field

For child items, the default value is the allocations value defined for the item by the administrator. You can update this value manually.

Function Total Field

The Function Total field is located in the function record. This field shows the total value of the function. The Function Total field value includes the Extended Net Price of the parent package, but not the Extended Net Prices of the child items.

Menu Per Person, Set Price Reference

The Menu Per Person, Set Price menu type is used when you can estimate an expected number of guests. The calculations are different from a Menu Per Person, Split Price and are controlled by the Split flag value, which is set to

N. In Menu Per Person, Set Price, Siebel Hospitality adds the menu prices together and displays them on a per person basis. Actual child line item quantities are reflected in the Extended Quantity fields. The child prices do not roll up to the parent price.

Example of a Menu Per Person, Set Price

In a Menu Per Person, Set Price, the Unit Net Price, Extended Price, Negotiated Price, Discount %, and Net Discount values apply only to the parent package. For child items, these values are not displayed and the fields are read only.

The following table shows an example of a menu per person, set price with an expected quantity of 10.

Parent	Child	Quantity	Extended Quantity	List Price	UOM	Unit Net Price	Negotiated Price	Extended Price	Discount %	Net Discount	Per Person Allocation
Menu	N/A	10	10	50.00	Per Person	50.00	N/A	500.00	0	0	N/A
Menu	Chicken	1	10	30.00	Per Person	Not applicable	N/A	N/A	N/A	N/A	25.00
Menu	Salad	1	10	20.00	Per Person	N/A	N/A	N/A	N/A	N/A	12.50
Menu	Dessert	1	10	15.00	Per Person	N/A	N/A	N/A	N/A	N/A	12.50

Menu Per Person, Set Price Field Behaviors

This topic describes the behaviors and internal calculations that Siebel Hospitality performs for selected fields in a Menu Per Person, Set Price and its child items. These behaviors are typical of the Menu Per Person, Set Price menu type.

Best Attendance Field

If Actual is not null, Best Attendance is equal to Actual. If Actual is null and Guaranteed is not null, Best Attendance is equal to Guaranteed. If Actual and Guaranteed are null and Projected is not null, Best Attendance is equal to Projected. If Actual, Guaranteed, and Projected are all null, Best Attendance is equal to Expected.

Extended Quantity Field

The Extended Quantity is calculated as the Parent Quantity multiplied by the Item Quantity, where Parent Quantity is equal to Best Attendance, for each child line item regardless of its UOM. You can manually modify the Extended Quantity of the parent and its child items.

For the parent package and static child line items, Siebel Hospitality does not perform this calculation, and Extended Quantity is the same as Quantity. Usually, all products associated with a Menu Per Person, Set Price have UOM is equal to Per Person.

Using values from the table in *Example of a Menu Per Person, Set Price*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	Quantity	Calculation
Menu	N/A	10	10
Menu	Chicken	1	1 multiplied by 10
Menu	Salad	1	1 multiplied by 10
Menu	Dessert	1	1 multiplied by 10

Unit Net Price Field

Unit Net Price is calculated as follows:

If Negotiated Price is null, the calculation is one of the following:

- List Price minus (List Price multiplied by Discount %)
- List Price minus Discount Amount

If Negotiated Price is not null, the calculation is one of the following:

- Negotiated Price minus (Negotiated Price multiplied by Discount %)
- Negotiated Price minus Discount Amount

Using values from the table in *Example of a Menu Per Person, Set Price*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	List Price	Discount %	Calculation	Unit Net Price
Menu	N/A	50.00	10	50 minus 5	45.00
Menu	Chicken	30.00	N/A	N/A	N/A
Menu	Salad	20.00	N/A	N/A	N/A
Menu	Dessert	15.00	N/A	N/A	N/A

Extended Price Field

Extended Price is calculated as Extended Quantity multiplied by Unit Net Price for the parent menu. For the child line items, Extended Price is null and read only.

Using values from the table in *Example of a Menu Per Person, Set Price*, the Extended Price is calculated as shown in the following table.

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Price
Menu	N/A	10	45.00	10 multiplied by 45	$450.00
Menu	Chicken	10	N/A	N/A	N/A
Menu	Salad	10	N/A	N/A	N/A
Menu	Dessert	10	N/A	N/A	N/A

Function Total Field

The Function Total field is located in the function record. This field shows the total value of the function. The Function Total field value includes the Extended Net Price of the parent menu, but not the Extended Net Prices of the child items.

Menu Per Person, Split Price Reference

A Menu Per Person, Split Price can have a choice of items. The calculations are different from a Menu Per Person, Set Price and are controlled by the Split flag value, which is set to Y.

Example of a Menu Per Person, Split Price

The following table shows an example of a menu per person, split price with 10 expected attendees, who order 3 menus with a Chicken entree and 7 menus with a Beef entree.

Parent	Child	Quantity	Extended Quantity	Split Pricing	List Price	UOM	Unit Net Price	Negotiated Price	Extended Net Price	Discount %	Net Discount	Per Person Allocation
Menu	N/A	10	10	N/A		Per Person	50.00	N/A	N/A	N/A	N/A	N/A
Menu	Chicken	3	3	Yes	30.00	Per Person	27.00	30.00	81.00	10	9.00	27.00
Menu	Beef	7	7	Yes	20.00	Per Person	20.00	20.00	140.00	N/A	N/A	20.00
Menu	Dessert	10	10	N/A	N/A	Per Person	N/A	N/A	N/A	N/A	N/A	N/A

Menu Per Person, Split Price Field Behaviors

This topic describes the behaviors and internal calculations that Siebel Hospitality performs for selected fields in a Menu Per Person, Split Price and its child items. These behaviors are typical of the Menu Per Person, Split Price menu type.

Quantity Field

In a Menu Per Person, Split Price, the default Quantity value of the menu items is 1. After adding a Menu Per Person, Split Price menu to an event, update the Qty fields manually to reflect the number of menus with that item that the guests want to order.

Best Attendance Field

If Actual is not null, Best Attendance is equal to Actual. If Actual is null and Guarantee is not null, Best Attendance is equal to Guaranteed. If Actual and Guaranteed are null and Projected is not null, Best Attendance is equal to Projected. If Actual, Guaranteed, and Projected are all null, Best Attendance is equal to Expected.

Extended Quantity for Non-Split Items Field

Extended Quantities for non-split menu items and for split menu items are calculated as follows:

- **Non-split items.** Extended Quantity is calculated as Parent Quantity multiplied by Child Item Quantity, where Parent Quantity is equal to Best Attendance, for each child line item that is a per person item. You can manually modify the Quantity of the parent and the child items.
- **Split items.** Extended Quantity is equal to Quantity.

Using values from the table in *Example of a Menu Per Person, Split Price*, the Extended Quantity is calculated as shown in the following table.

Parent	Child	Split Pricing	Quantity	Calculation for Extended Quantity
Split Menu	N/A	N/A	10	10
Split Menu	Chicken	Yes	3	3
Split Menu	Beef	Yes	7	7
Split Menu	Dessert	N/A	1	1 multiplied by 10

Unit Net Price Field

Unit Net Price is calculated as follows:

If Negotiated Price is null, the calculation is one of the following:

- List Price minus (List Price multiplied by Discount %)
- List Price minus Discount Amount

If Negotiated Price is not null, the calculation is one of the following:

- Negotiated Price minus (Negotiated Price multiplied by Discount %)
- Negotiated Price minus Discount Amount

Using values from the table in *Example of a Menu Per Person, Split Price*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	Split Pricing	List Price	Discount %	Calculation	Unit Net Price
Split Menu	N/A	N/A	N/A	N/A	N/A	N/A
Split Menu	Chicken	Yes	30.00	10	30 minus (30 multiplied by 0.1)	27.00
Split Menu	Beef	Yes	20.00	N/A	20	20.00
Split Menu	Dessert	N/A	15.00	N/A	N/A	N/A

Extended Net Price Field

The Extended Net Price is calculated as Extended Quantity multiplied by Unit Net Price for both the parent menu and the child line items.

Using values from the table in *Example of a Menu Per Person, Split Price*, the Unit Net Prices are calculated as shown in the following table.

Parent	Child	Extended Quantity	Unit Net Price	Calculation	Extended Net Price
Split Menu	N/A	10	50.00	10 multiplied by 50	$500.00
Split Menu	Chicken	3	27.00	3 multiplied by 30	$81.00
Split Menu	Beef	7	20.00	7 multiplied by 20	$140.00
Split Menu	Dessert	10	N/A	N/A	N/A

Function Total Field

The Function Total field is located in the function record. This field shows the total value of the function. The Function Total field value includes the Extended Net Prices of the split menu child items, but not the parent menu.

22 Managing Nonparticipating Properties

Managing Nonparticipating Properties

This chapter describes the procedures that administrators and users, such as sales representatives, sales managers, and event managers perform to manage nonparticipating properties using Siebel Hospitality. It includes the following topics:

- *About Nonparticipating Properties*
- *Process of Managing Nonparticipating Properties*
- *Setting Up Nonparticipating Properties*
- *Developing Opportunities for Nonparticipating Properties*
- *Generating Quotes for Nonparticipating Properties*
- *Finalizing Quotes for Nonparticipating Properties*
- *About Orders and Nonparticipating Properties*

About Nonparticipating Properties

Nonparticipating properties (NPPs) are properties that do not use the Hospitality Event Sales Execution, Central Reservation System, or Function Space Inventory processes. However, events for these properties might be sold by a member of the property brand and the National Sales Organization (NSO). Event Booking Centers (EBC) sell space from and pass event opportunities to NPPs.

When you, as the administrator, create property records, you can flag a property as nonparticipating. Flagging a property in this manner has ongoing effects for users when they work with opportunities and quotes for the property. For example, when you create an NPP, it is advised that only one sleeping room, one function space, and one catering product is created, as you do not have full details of what is available at the NPP. This means that only one type of sleeping room, function space, and catering product can be added to a quote for an NPP when it is generated from an opportunity.

When a property is designated as a nonparticipating property, all availability checks (for function spaces and sleeping rooms) and pricing features are disabled. This means that when a quote is generated from an opportunity for a nonparticipating property, the sales representative must manually update line item room nights, functions agendas, status, and revenue for the opportunity and quote. Also, asset checks are not carried out for assets associated with a function.

After a quote for an NPP has been fully created and all the information about the quote has been created, the sales representative can send an email to the NPP so that a representative for the NPP can confirm that the details of the quote are accurate. It is also possible to send a quote evaluation to the NPP by email, so that the quote can be evaluated by the NPP. There are templates present in Hospitality that extract the required information from the quote Summary and Evaluations form. If necessary you can create more templates from the Administration - Communications screen, All Templates, Simple view.

Process of Managing Nonparticipating Properties

This topic lists the tasks typically performed by event managers, sales managers, and sales representatives when managing nonparticipating properties. Your company might follow a different process according to its business requirements.

> **Note:** Nonparticipating-property records must be set up by the administrator. For instructions on creating such records, see *Setting Up Nonparticipating Properties*.

To manage nonparticipating properties, perform the following tasks:

- *Developing Opportunities for Nonparticipating Properties*
- *Generating Quotes for Nonparticipating Properties*
- *Finalizing Quotes for Nonparticipating Properties*
- *About Orders and Nonparticipating Properties*

Setting Up Nonparticipating Properties

Nonparticipating properties are set up by the administrator when the property records are created in the Siebel Hospitality database. For more information about setting up nonparticipating properties, see *Setting Up Nonparticipating Properties*.

When you have identified a property as nonparticipating, it is advised that you create one function space, one sleeping room, and one catering product, which can be used when an opportunity is generated from a quote. For more information about adding function spaces, sleeping rooms, and catering products to a property record, see *Setting Up Function Spaces, Sleeping Rooms, and Suites*

This task is a step in *Process of Managing Nonparticipating Properties*.

Developing Opportunities for Nonparticipating Properties

Opportunities for nonparticipating properties are developed and detailed in the same manner as any other opportunity. The following tasks are carried out:

1. The sales representative creates the opportunity with all irrelevant details.
2. The sales representative adds a function agenda.
3. The sales representative adds room block information and room blocks.
4. The sales representative adds extra information, such as notes, attachments, activities, billing information, and so on.
5. The sales representative selects a nonparticipating property for which a quote can be generated.

6. The sales representative generates a quote.

For more information about each of these tasks, see *Process of Capturing Hospitality Opportunities*.

Generating Quotes for Nonparticipating Properties

For nonparticipating properties, generic products (line items and room blocks) are not mapped to property-specific products. Instead, the generic agenda is replicated in the Quotes screen, Line Items view. When a quote is generated for a nonparticipating property, the National Sales Organization, Event Booking Center, or whoever creates the quote must provide details to the NPP about the opportunity, and must then request pricing and availability information.

When a quote is generated for a nonparticipating property, the following tasks are carried out:

1. Function agenda and Room Block Information is copied from the opportunity to the quote.
2. Notes, attachments, and activities are copied from the opportunity to the quote.
3. Availability, pricing, average values, and asset inventory checks are bypassed. No revenue rollup occurs.
4. The sales representative sends the quote information to the nonparticipating property using either fax or email. For more information, see *Sending a Quote Summary to the Nonparticipating Property*.
5. A representative at the nonparticipating property then completes the information and returns it to the Event Booking Center or National Sales Organization.
6. Before the quote is turned definite, it must be evaluated by the NPP. The sales representative sends the quote evaluation information to the nonparticipating property using either fax or email. For more information, see *Sending a Quote Evaluation to the Nonparticipating Property*.
7. The nonparticipating property then evaluates the information and returns it to the Event Booking Center or National Sales Organization.

After the quote has been generated for an NPP, the sales representative must be aware of the following facts:

- At this stage the sales representative can add one room block and one function space if these items are not already present. The sales representative can also add NPP-specific critical and noncritical products and assets. For more information, see *Managing Functions Associated with Quotes* and *Managing Event Room Block Information in Quotes*.
- The following buttons are not available for use: Reprice, Reprice All, and Refresh, as pricing and rollup is not available for NPPs.
- Clicking the Reserve button for functions switches the function between an inventory status of Reserved and Unreserved.
- If you use the AutoBook functionality for quote function line items associated with nonparticipating properties, critical resource switches between a status of Booked and Not Booked.
- Clicking the Reserve button for room block line items switches inventory status between a status of Reserved and Unreserved.
- Time shifting of Function Spaces and Room Blocks is not supported for NPPs.
- If a function time is changed, then no availability check for the function space is started.
- If you cancel a function, the line items of that function are automatically unreserved.
- If you cancel a room block or line item, then the appropriate items are all unreserved.
- The sales representative fills in summary information to the Quote Summary Revenue Form when all other quote details have been completed. For nonparticipating properties, you can fill in the following fields: Total Profit, Total Revenue, Sleeping Room Profit, Sleeping Room Revenue, Function Space Profit, Function Space

Revenue, Required Thresholds, and Threshold Profit Variance. You can also edit the Revenue Categories and Negotiation lists.

- For nonparticipating properties, the “Update Quote Status - Time Based" and “Update Quote Status - Date Bases" workflows are not triggered.

Sending a Quote Summary to the Nonparticipating Property

A quote summary is sent to an NPP by email when all the details about the quote have been entered. After this information has been sent, a representative from the NPP can send feedback on the quote summary to the sales representative.

Note: In order to carry out the following procedure, email integration must be enabled. For more information about setting up email integration, see *Siebel CTI Administration Guide* .

To send a quote summary to a nonparticipating property

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote.
3. Click the link in the Name field, and then click the Summary tab.
4. From the File menu, choose Send Email.

   The Send Email window is displayed.
5. Click the drop-down arrow in the body field, and select Quote Summary (eHospitality).
6. Enter the email address of the addressee at the NPP, and then click Send.

   The email is sent to the specified person.

Sending a Quote Evaluation to the Nonparticipating Property

A quote evaluation is sent to an NPP by email before the quote can be turned definite. After this information has been sent, a representative from the NPP can evaluate the quote and return the evaluation to the sales representative.

Note: In order to carry out the following procedure, email integration must be enabled. For more information about setting up email integration, see *Siebel CTI Administration Guide* .

To send a quote evaluation to a nonparticipating property

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote.
3. Click the link in the Name field, and then click the Evaluations tab.
4. From the File menu, choose Send Email.

   The Send Email window is displayed.
5. Click the drop-down arrow in the body field, and select Quote Evaluation (eHospitality).
6. Enter the email address of the addressee at the NPP, and then click Send.

   The email is sent to the specified person.

Finalizing Quotes for Nonparticipating Properties

The process of finalizing a quote for a nonparticipating property is the same as that for any other quote, and the following tasks are performed:

1. The sales representative generates an agreement from the existing information for the quote.
2. The customer accepts the quote and sends back the signed contract.
3. The sales representative turns the quote to a status of Definite. In order to turn the quote to Definite, all function and room block line items must have a status of Reserved. However, if the function or room block has been cancelled, then these line items might have a status of Unreserved.
4. All other properties for the quote are automatically turned to a status of Lost.
5. If the sales representative changes the status of the quote to Lost or Turndown, then all inventory associated with the quote is released.
6. The sales representative completes the turnover checklist.
7. The sales representative passes the turnover checklist on to the nonparticipating property.

For more information about each of these tasks, see *Roadmap for Finalizing a Quote and Managing Turnover*.

About Orders and Nonparticipating Properties

Orders for nonparticipating properties are handled in a similar way as other orders. For more information, see *Process of Generating and Managing Event Orders*. This process is as follows:

1. The sales representative generates a primary order.
2. The sales representative generates function orders.
3. (Optional) The sales representative changes the primary event order associated with a function.
4. The sales representative associates event orders with a function line item.
5. The sales representative creates functions from the orders screen.
6. The sales representative can view all line items associated with an order.
7. The sales representative adds notes to an order.
8. The sales representative adds attachments to an order.

However, there are a number of differences when dealing with orders for nonparticipating properties than with orders for participating properties as follows:

- Pricing for orders associated with NPPs does not work.
- Autobooking of critical resources does not work, as availability checks are not performed.
- Event Checks are not generated for orders associated with NPPs.
- At the Order stage for NPPs, functions cannot be optioned or overbooked, and cannot use the next fit functionality. This means that the Option, Overbook, and Next Fit buttons are disabled for order functions associated with NPPs.
- At the Order stage for NPPs, function line items cannot be double-booked, and it is not possible to reprice items. This means that the Double Book, Reprice, and Reprice All buttons are disabled for order line items associated with NPPs.

23 Managing the Function Space Diary

Managing the Function Space Diary

This chapter describes the features of the Function Space Diary and the procedures that users perform to manage the diary. It includes the following topics:

- *About the Function Space Diary*
- *Process of Configuring the Function Space Diary*
- *Process of Managing the Function Space Diary*

About the Function Space Diary

The *Function Space Diary* (hereafter referred to as *the diary*) is a Scheduler chart within Siebel Hospitality. Sales representatives, event managers, and revenue managers use the diary to manage day-to-day bookings of function spaces and to optimize event operations. The diary displays the allocation of resources during a specified time period. For example:

- Sales representatives use the diary to verify the availability of function space.
- Event managers use the diary to view the availability and achieve operational efficiency for an event. For example, event managers might use the diary to identify events that have significant food and beverage requirements and relocate those events to function spaces close to the kitchen.
- Revenue managers use the diary to review function-space availability as an indicator of future revenue and to develop recommendations on how function space can be used to bring in additional revenue for the property. Revenue managers also manage the process of assigning category bookings to specific spaces.

The diary shows function space bookings for several time periods and enables event personnel to change the time scale. They can filter the displayed data by start date, time scale, display, turn times, and so on. Color coding indicators differentiate between weekdays, weekends, and holidays.

The following topics describe the functions and components of the diary:

- *Visibility Rules and the Function Space Diary*
- *Function Space Diary Views*
- *Function Space Diary View Elements*
- *Function and Booking Details in the Function Space Diary*
- *Icons in the Function Space Diary*
- *Viewing ToolTips in the Function Space Diary (Users)*
- *Space Holds in the Function Space Diary*

Visibility Rules and the Function Space Diary

The information that can be viewed in the Function Space Diary depends on the user's assigned responsibility and associated visibility rules. The appropriate views must be added to each responsibility. The following table lists user

responsibilities and the type of records that users are able to access according to the visibility rule associated with each responsibility.

In the diary, each user is given the maximum visibility by default. For example, if a property user goes to a diary view, then this user can view bookings only for the property assigned to him.

User	Visibility Rule
Property user	Users who have a specific property assigned to them can see only bookings relating to that particular property. For more information about property users, see *Assigning the Property Team*.
Cluster user	Users who are members of a specific cluster can see only bookings that relate to that particular cluster. For more information about cluster users, see *Assigning Clusters to a User*.
Administrator	Administrators can see bookings for all appropriate organization properties.

Clusters can be used to prevent users at one hotel from gaining an inappropriate competitive advantage by viewing the Function Space Diary of another hotel in the same chain. Typically, users (for example, sales representatives) can view diary information for their own assigned properties as well as any properties assigned to a cluster with which their login ID is associated. For more information about clusters, see *Process of Setting Up Property Clusters*. Administrators can usually view diary information for properties in all organizations. For more information on adding views to user responsibilities, see *Siebel Security Guide* .

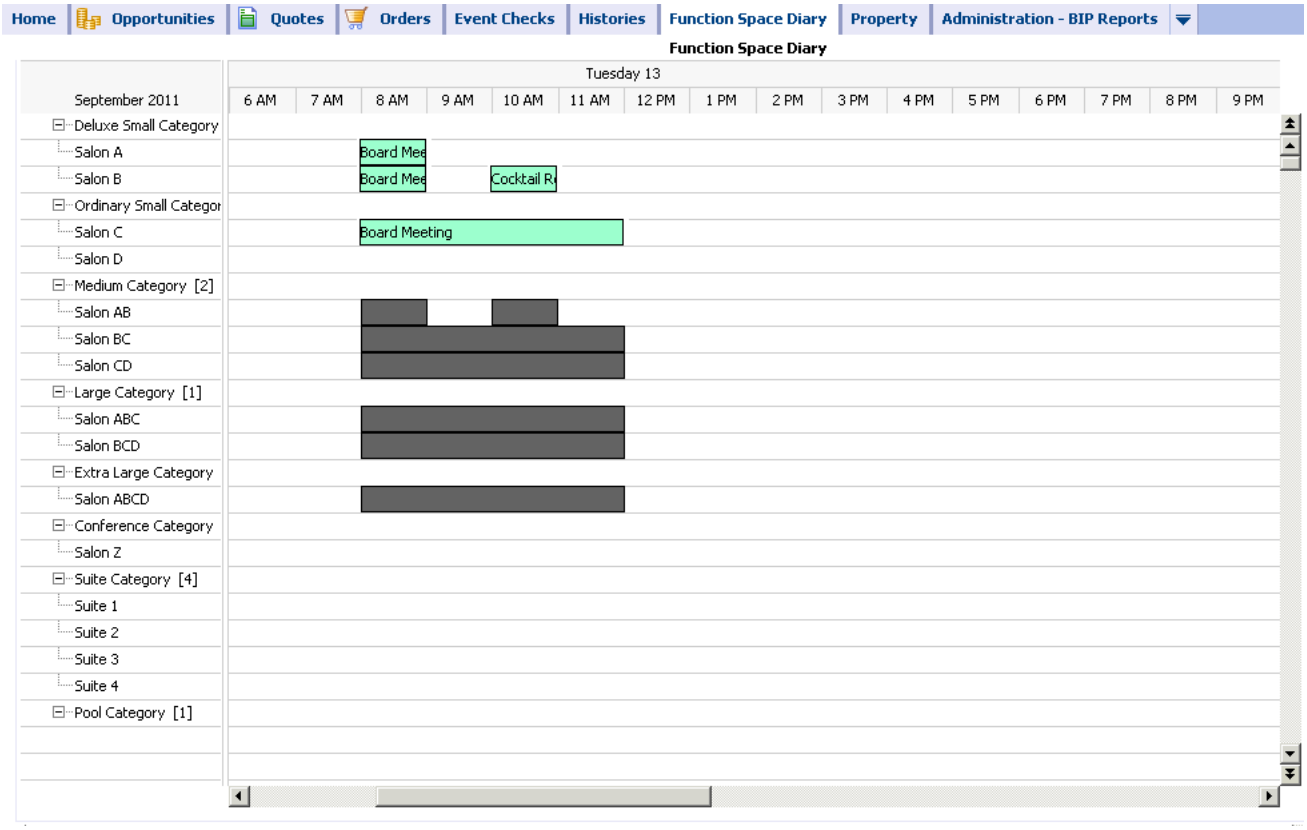
Function Space Diary Views

The Function Space Diary screen displays the Property form first, followed by the view tabs. The Property form shows the name and type, the number of function rooms, and number of sleeping rooms for the first property record. From the form, users can query for a different property.

> **Note:** The diary does not display the associated functions for nonparticipating properties. If users query for a nonparticipating property within the Function Space Diary, then the views are empty. For more information about nonparticipating properties, see *Adding Property Records*.

Function Space Diary Sales/Execution Diary View

The Sales/Execution view is the default view for the diary. Most of the function booking information that sales representatives and event managers require appears in this view. The following image shows the one-day time scale in the Function Space Diary.



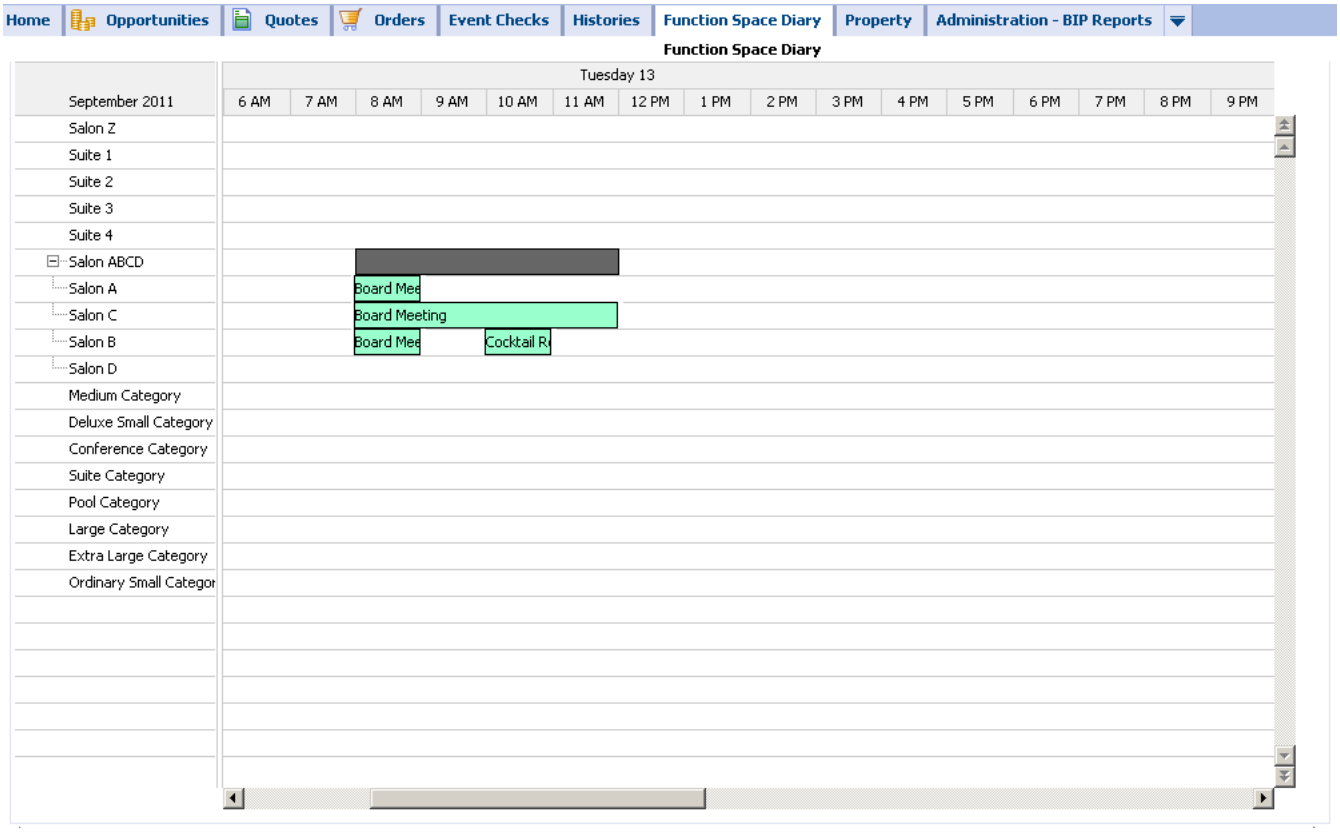
Function Space Diary Revenue Management View

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

The Functions information shown in this diary view is similar to the list that appears on the Functions screen. From this view, users can update and copy function records, reserve and start the best-fit process, and overbook, option, and cancel functions. For more information on performing any of these actions, see *About Managing Functions at the Quote Stage*.

Function Space Diary Compact Diary View

The Compact Diary view, as shown in the following image, is used to display function spaces in a more compact form.



Unlike the other diary views, the function spaces are not grouped according to category but instead are grouped according to their parent-child relationships (biggest parent, smallest child on the y-axis). This view can be useful when a property contains large numbers of function spaces. For example, if a property has a large function space called Salon ABCD, which is formed by connecting Salons A, B, C, and D, then each of these salons is displayed under the biggest parent, Salon ABCD, in the Compact Diary view.

Users can expand or collapse the parent-child relationships by using the Expand All and Collapse All buttons. If the user moves the mouse over the category names on the y-axis, then the ToolTip displays a list of the function spaces that are included in the particular category.

All indivisible function spaces are also listed in the Compact Diary view. They appear separately according to parent-child relationships and within the *compact sequence,* which is the order of display.

The function spaces can be displayed in a particular order in the Compact Diary view. This compact sequence is configured using the Property Administration screen, Specific Space view and Category view.

As with the other diary views, users can select and (without releasing the selection) move bookings onto different function spaces and time periods within the Compact Diary view. However, unlike the other diary views, when users attempt to select and move a booking, they must confirm their action by selecting the appropriate function space from the Pick Function Space dialog box that appears. The Pick Function Space dialog box shows only function spaces that are related to the space where users are moving the function.

Bookings that are made using configured function spaces are displayed as separate indicator bars within the Compact Diary view to show that each of the function spaces is in use at a particular time. For example, a function is booked in Salon ABC. Within the Compact Diary view, an indicator bar appears adjacent to each of these function spaces for the appropriate time period. Salon A, B, and C have the same function name outlined against their individual indicator bars.

Function Space Diary Total Availability View

The Total Availability view is used to display function bookings in the context of inventory displays. In addition to all the information contained in the Sales/Execution Diary view, this view also shows total sleeping room availability. Sleeping room availability information appears in the Total Group Availability list.

The date fields in the various sections of the view interact in the following ways:

- On the Scheduler chart, when you complete the Start Date field and click Search, or click the arrow buttons, the first date in the Total Group Availability list changes to match the Start Date field value.
- On the Scheduler chart, when you move the horizontal scroll bar, the date range of the Total Group Availability list is not affected.
- In the Total Group Availability list, when you change the dates either by querying or by clicking the arrow buttons, the Start Date field value on the Scheduler chart does *not* change to match the changes to the Total Group Availability dates.

Users can also review sleeping room availability from the Function Space Diary by clicking the major time axis (Date field). This action takes the user to the Property screen, Total Availability view, which shows property availability records starting from the selected date. Unlike the Total Availability view of the diary (which shows only the Total Group Availability), the Property screen, Total Availability view shows total, group, and transient availability.

Function Space Diary View Elements

In the image shown in *Function Space Diary Sales/Execution Diary View*, the Function Space Diary shows current bookings, overbookings, and dependency bookings represented by bars that extend horizontally along the segments of the selected time period (x-axis). The predefined color and patterns assigned to each bar represent the inventory status, setup time, and tear-down time of the function. When space permits, the indicator bar displays booking information. The information displayed on the indicator bar is specified by the option chosen from the Display drop-down list.

Each category and its component-specific space is shown on the y-axis. Users can expand or collapse individual categories by clicking + (plus) or - (minus). The categories and specific spaces are displayed according to the Display Sequence specified within the Property Administration screen, Category view and Specific Space view, respectively. In addition, values for the category capacity and authorization level are displayed next to each category name. Because authorization levels can vary from day to day, it is important to note that the authorization level shown on the y-axis relates to the date specified in the Start Date field.

When the mouse pointer is positioned on the category or specific space name, the name is highlighted and underlined. If users click the category name link, then they are brought to the Property Administration screen, Category view. They can then query for the appropriate category record. If users click the specific space name link, then they are brought to the Property Administration screen, Specific Space view and can then query for the appropriate specific space record.

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

By scrolling horizontally, users can see the bookings for the same function space for specific time periods. This capability is useful for reviewing past dates with actualized bookings to compare availability at a similar season in the past. Click the date on the major time axis to navigate to the Property screen, Total Availability view. For more information on the Total Availability view, see *Function Space Diary Total Availability View*. Users can also click on a booking label link and navigate to the Function screen, Line Items view.

Note: After users leave the diary and return by clicking Back, the time scale of the diary changes back to the default values. For example, the default time scale value is Day/Hour. A sales representative selects the Week/Day time scale option to view information, navigates away from the Function Space Diary view, and then returns by clicking Back. When the diary is displayed again, the information appears in the Day/Hour time scale.

Function and Booking Details in the Function Space Diary

Color-coded indicator bars and icons are used to indicate different types of functions and bookings. For more information about icon usage in the diary in the Function Space Diary, see *Icons in the Function Space Diary*.

Color-Coded Day Indicators

Color-coded indicators differentiate between weekdays, weekends, and holidays in the Function Space Diary. If a holiday occurs on a weekend, then the weekend color takes priority. The same color coding applies to the Availability views. Holidays are also marked by an icon in all views except the Month/Day view, where they are marked only by color. The Holiday icon is shown in *Icons in the Function Space Diary*.

Users can customize the colors for holidays and weekends in the Function Space Administration screen, Function Space Diary Administration, Function Color Schema view.

Active and Backup Bookings

If certain function spaces require backup spaces, then an icon is displayed next to the appropriate function space names on the y-axis. Icons are also used to indicate other booking attributes, for example, bookings that are on 24-hour hold, affiliate bookings, noisy bookings, and so on.

Active and backup bookings are differentiated though the use of a colored border. For example, the administrator might define *blue* as the active booking color and *yellow* as the backup booking color. When displayed in the diary, the active booking is shown with a blue border, while the backup booking is shown with a yellow border.

Dependency Bookings

Dependency bookings are displayed in the diary to indicate bookings that affect other function spaces. For example, if a combined space (A and B and C) is booked, then individual spaces A, B, and C have dependency bars. If, however, AB is booked, then the combined space ABC has dependency bars.

The color for the dependency bars is defined by the administrator. Users cannot change the dependency bookings; a ToolTip on the dependency booking shows the function causing the dependency along with the start and end time. In many cases, dependency bookings can be the result of multiple bookings. In this situation, the ToolTip information lists the function space bookings that cause the dependency booking.

Overbookings and Optioned Bookings

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

Out of Order, Unavailable, and Temporarily Assigned Function Spaces

When a function space is set to Out of Order or Unavailable, users can view this information in the Function Space Diary. The color for an Out of Order and Unavailable function space is configured by the administrator. The label shows the

booking type (Unavailable or Out of Order) with no setup and tear-down time. Temporarily Assigned category spaces are shown against specific spaces in a color predefined by the administrator.

Reserved Beyond Capacity Bookings

Functions that are reserved beyond capacity are differentiated from other bookings through the use of a specific color as defined by the administrator. A function space can be reserved beyond capacity by setting an authorization level, which is higher than the capacity level. For example, the capacity level for Salon A is 2, but the authorization level is set to 3. If the function space is reserved three times, then it appears as Reserved Beyond Capacity.

Time-Shifted Bookings

Reserved bookings, which have been shifted to a different time period or date, are indicated by the addition of the word *Shifted* to the function name on the indicator bar. The color of the indicator bar also changes to the defined color for Reserved Shifted. The original booking still appears also in the diary. If the booking cannot be reserved after shifting, then it does not appear in the diary.

Function Bookings in Suites

If functions are scheduled to take place in reserved suites, then both the suite booking and the function booking are displayed in line with the appropriate suite name. The indicator bar for the particular suite is halved horizontally, and an additional indicator bar appears showing the start and end times for the function in the suite. A separate ToolTip appears for the reserved suite booking and the scheduled function, providing relevant information for each.

Effective Start and End Times

If effective start and end times have been added for any function spaces or categories, then these can be viewed in the diary. The ToolTip shows the effective start and end times for the particular function space. The color for an Ineffective function space is configured by the administrator.

Categories and specific spaces are typically removed from the diary view if they are not effective for any of the dates currently displayed. The exception to this is if the dates shown in the diary are within the cached date range of the diary. The diary caches information about a certain range of dates beyond what is currently shown and can begin showing a category or specific space up to approximately a month before it becomes effective. When such cached date ranges appear depends on the Time Scale option that users are using to view the information. For an explanation of the Time Scale option, see *Changing the Way Information Is Displayed in the Function Space Diary*.

Icons in the Function Space Diary

Icons are used in the diary to identify different types of bookings and function details. Siebel Hospitality provides a default set of icons, which you can customize. For more information about changing the diary icons, see *Configuring the Function Space Diary Icons*.

By default, the diary uses the icons that are shown in the following table.

Icon	Name and Description	Indicates that...
	24-hour hold: A box displaying the number 24.	The current function space is on hold for 24 hours. Displayed on the booking indicator bar if space permits.

Icon	Name and Description	Indicates that...
	Backup required: A page overlayed with a hazard symbol (exclamation mark).	The current function space requires a backup function space. Displayed next to the function space name on the y-axis.
	Noise: A speaker.	The booking will be noisy and might disturb other guests. Displayed on the booking indicator bar if space permits.
	Host booking: Three-person shapes where the one in the middle is in front of the other two in the background.	The booking is a host booking. Displayed on the booking indicator if space permits.
	Affiliate booking: Three-person shapes side by side.	The booking is an affiliate booking. Displayed on the booking indicator bar if space permits.
	Specific suite function: Two person shapes, one behind the other.	The booking is a function scheduled in a reserved specific suite used for sleeping.
	Related occurrence booking: A first curved line with arrow follows a second curved line with arrow, which in turn follows the first curved line with arrow.	The booking is part of a series of recurring events.
	Do not move: A padlock, which is gold.	The booking must not be moved from the specified function space. Displayed on the booking indicator bar if space permits
	Detail: A flag, which is gold.	The booking is a detailed function. Displayed on the booking indicator bar if space permits. **Note:** If this icon is displayed next to a function space name on the y-axis, then it indicates a specific space, which does not belong to any category.
	Suite. A bed.	The booking is for a suite. Displayed on the booking indicator bar if space permits.
	Holiday. A tropical tree.	The date is a holiday. This icon appears in all Function Space Diary views except the Month/Day view, where holidays are indicated only by the changed cell color specified in the Function Space Diary Administration screen.
	Special event. A bell, which is yellow.	The date is a special event. This icon appears in all Function Space Diary views except the Month/Day view, where special events are indicated only by a small, three-cornered flag (which is red) in the upper corner of the cell.
	Sell note: A dollar sign on a note pad.	The sell note is associated with the date. This icon appears in all Function Space Diary views except the Month/Day view, where sell notes are indicated only by bold text.

Icon	Name and Description	Indicates that...
	Red triangle: A small three-cornered flag, which is red.	An event occurs on the date, but space limitations prevent a larger icon from being displayed. This icon marks special events in the Month/Day view.

Viewing ToolTips in the Function Space Diary (Users)

This topic describes how to view summary information in the Function Space diary, using ToolTips.

To view a summary of function details through the ToolTip feature

- Position the mouse pointer over an element of the diary display.

  The ToolTip appears. The following table describes the content of ToolTips for different diary elements.

Position the Mouse Pointer over an Element...	A ToolTip Displays the Following...
Function	○ Function name ○ Function type ○ Function status ○ Start time ○ End time ○ Setup style ○ Expected number of attendees If a sales manager or an event manager has been nominated for the function, then these details can also be included in the ToolTip.
Setup or tear-down time	○ Start Date ○ End Date ○ Time Period If the Turn Times check box is selected, then the time periods for each booking's setup and tear-down are displayed according to the pattern predefined by the administrator.
Function space category	○ Capacity ○ Usable Area ○ Description
Individual function space	○ Physical Area ○ Usable Area ○ Description

Additionally, if a special event, holiday, or sell note has been activated and attached to a date in the Function Space Diary, the ToolTip for that date displays description information for the item.

The information displayed in the ToolTip depends on the option selected from the Display drop-down list. For example, if users select Function Name, the function name appears on the booking indicator bar and not in the ToolTip.

Space Holds in the Function Space Diary

A *space hold* is a temporary or permanent hold placed on a function space to reserve it for an event during a future time period. When a space hold is temporary, the function is referred to as being *detailed*. Typically, when a space hold is applied, the space must be held regardless of whether or not it is used. The diary can display space holds. For more information about space holds, see *About Space Holds*.

The Function Space Diary characteristics that support the management of space holds are as follows:

- Display space holds in the diary.

  A space hold function appears in the diary in the color defined by the administrator. The color can be different from the color in which the diary displays regular functions.

  The color for the space hold is the color that the administrator has defined in the Function Space Administration screen, Function Space Diary Administration view.

- Show that other spaces are blocked because of a space hold.

  When a function space is booked as a space hold, the diary blocks the space that is taken up because of this booking. For example, if Salon A is booked from 1:00 p.m. to 2:00 p.m., then Salon AB is also blocked from 1:00 p.m. to 2:00 p.m. because of the booking in Salon A.

  A setting in the Function Space Administration screen, Function Space Diary Administration view enables administrators to set the color and pattern of such secondary blocked spaces.

- Display the individual functions that are booked within a space hold.

  When a space hold is detailed with subfunctions, these subfunctions are assigned a function space and displayed in the diary. (Under circumstances that are not part of a detailing scenario, subfunctions are not displayed in the diary.) Child subfunctions are not displayed in the diary. Subfunctions do not appear in the Compact Diary view. The display color of subfunctions is the same as the color of the parent function.

  A setting in the Function Space Administration screen, Function Space Diary Administration view enables administrators to turn off the display of subfunctions.

- Differentiate the individual functions that are part of a space hold.

  Users can distinguish the functions that are part of a space hold through a visual indicator. The diary provides options to modify the pattern of subfunctions. By default, the pattern is the same color that is used to show regular booked functions.

- Show the blocked space that is blocked by a function within a space hold.

  Users can see the blocked space that is blocked due to a space hold by way of a color that represents the space that is blocked by a function within a space hold. Users can also distinguish this blocked space from the space within a space hold that is not blocked by a function. This is accomplished by providing two shades of color for the blocked space.

The color is modifiable in the Function Space Administration screen, Function Space Diary Administration view. A setting enables administrators to turn off the display of subfunctions. In this view, if the display of subfunctions is turned off, then the blocked space will not be shown.

- Provide the ability to select and (without releasing the selection) move functions within a space hold.

  For more information, see *Moving Space Hold Bookings*.

For more information about the color display settings in the Function Space Administration screen, Function Space Diary Administration view, see *Defining Status Color Schemes for the Function Space Diary*.

Process of Configuring the Function Space Diary

This topic lists the tasks that administrators perform to configure the Function Space Diary. Your company might follow a different process according to its business requirements.

To view configure Function Space Diary, perform the following tasks:

- *Configuring Navigation from the Function Space Diary to the Quote and Function Views*
- *Configuring the Function Space Diary Icons*

Note: Before the Function Space Diary can be used, an administrator must also define property day parts, function space status indicators, and asset inventory status indicators. For more information, see *Defining Day Parts, Status Indicators, and Setup Style Translations*. Additionally, an administrator must add property floor plans. For more information, see *Setting Up Properties*.

Configuring Navigation from the Function Space Diary to the Quote and Function Views

Administrators can use Siebel Tools to configure the Function Space Diary so that users can click a blocked function in the Function Space Diary and navigate to the corresponding quote or function view.

This task is a step in *Process of Configuring the Function Space Diary*.

To configure navigation from the Function Space Diary to the Quote and Function views

1. Launch Siebel Tools.
2. To configure the Quote view drilldown, set the values in the following table.

Item	Value
User Property	Item Drilldown Src Field Substitutes
Value	Item Drilldown;Quote Id

Item	Value
Drill Down Object	Item DrillDown
View Name	TNT SHM Quote Function Line Items View
BC Name	Quote

If you use this configuration, then the Property, Date, Time, and Function Room items are carried over to the quote.

3. To configure the Function view drilldown, set the values in the following table.

Item	Value
User Property	Item Drilldown Src Field Substitutes
Value	Item Drilldown; Function Id
Drill Down Object	Item DrillDown
View Name	TNT SHM Function Line Item More Info View
BC Name	TNT SHM Function

For more information on configuring navigation in Siebel Tools, see *Using Siebel Tools* .

Configuring the Function Space Diary Icons

The diary uses several types of icon graphics. Icons identify different types of bookings and function details. Button icons identify navigation buttons. Hierarchy icons depict the hierarchical relationships among the function spaces.

Siebel Hospitality provides a default set of icons for the diary. You can change the appearance of the diary icons by replacing the existing icon graphics with other graphics of your choice or design.

This task is a step in *Process of Configuring the Function Space Diary*.

To configure the Function Space Diary icons

1. Navigate to the Administration - Application screen, then the System Preferences view.
2. Create a new system preference record with field values as shown in the following table.

Field	Value	Comments
Sys Preference Name	TNT CMT Configurable Icons	None.
Sys Preference Value	Y	A value of Y enables you to configure the icons.

3. Navigate to the following directory: `sai\applicationcontainer_external\siebelwebroot\images`.
4. Paste the new icon files into the \images folder to replace the default icons.

   New icons must have the same file names and specifications as the default icons they replace. For more information about icon file names, functions, and specifications, see *Icon Graphics and Files of the Function Space Diary*.

Icon Graphics and Files of the Function Space Diary

This topic covers the default icons, function icons, and button icons for the diary in Siebel Hospitality.

Icons

All icon graphic files are BMP files. Pixel sizes are as follows, unless otherwise noted:

- 12 pixels wide
- 11 pixels high

The icons are listed in the following table. Pictures, descriptions, and the types of bookings or function details that they indicate are shown in *Icons in the Function Space Diary*.

Icon	File Name	Pixel Sizes
24-hour hold	ind_24hr_hold	Standard
Backup required	ind_backup_req	Standard
Noise	ind_noise	Standard
Host booking	ind_host_booking	Standard
Affiliate booking	ind_affiliates_booking	Standard
Related occurrence booking	ind_recurring	Standard
Do not move	ind_dont_move	Standard
Detail	Ind_detail_marker	Standard

Icon	File Name	Pixel Sizes
Suite	ind_sleep	Standard
Holiday	ind_holiday	Standard
Special event	ind_special_events	Standard
Sell note	ind_sell_note	Standard
Function schedule	Ind_fnctn_schedule_marker	Standard
Red triangle	ind_Red_Icon	6 pixels wide 6 pixels high

Note: For more information about each of these icons, see *Icons in the Function Space Diary*.

Hierarchy Icons

All hierarchy icon graphic files are BMP files. Pixel sizes are as follows:

- 18 pixels wide
- 18 pixels high

The hierarchy buttons depict the various relationships among the hierarchies of detailed and indivisible function spaces in the function space list. The hierarchy icons are shown and described in the following table.

Icon	Description	File Name
	An empty box, with a horizontal dotted line and a vertical dotted line intersecting at the center to show a time of 3 o'clock, and the same vertical dotted line intersecting the center of the box to show a time of 6 o'clock.	hier_tee_ltr_d
	An empty box (blank space).	hier_space
	A minus sign in a box, with a horizontal dotted line jutting out from the minus sign.	hier_collapse_ltr_d
	A plus sign in a box, with a horizontal dotted line jutting out from the plus sign.	hier_expand_ltr_d
	A plus sign in a box, with a horizontal dotted line and a vertical dotted line intersecting at the center to show a time of 3 o'clock, and the same vertical dotted line intersecting the plus sign to show a time of 6 o'clock.	hier_exp_tee_ltr_d
	A plus sign in a box, with a horizontal dotted line and a vertical dotted line intersecting at the center to show a time of 3 o'clock.	hier_exp_elbow_ltr_d

Icon	Description	File Name
	An empty box, with a horizontal dotted line and a vertical dotted line intersecting at the center to show a time of 3 o'clock.	hier_elbow_ltr_d
	A minus sign in a box, with a horizontal dotted line and a vertical dotted line intersecting at the center to show a time of 3 o'clock, and the same vertical dotted line intersecting the minus sign to show a time of 6 o'clock.	hier_coll_tee_ltr_d
	A minus sign in a box, with a horizontal dotted line and a vertical dotted line intersecting at the center to show a time of 3 o'clock.	hier_coll_elbow_ltr_d

Button Icons

All button icon graphic files are BMP files. Pixel sizes are as follows:

- 16 pixels wide
- 16 pixels high

The button icons are shown and described in the following table.

Icon	Description	File Name	Function
	Double down arrows (enabled)	Diary_PageDown_Enabled	Identifies an enabled Page Down button.
	Double up arrows (enabled)	Diary_PageUp_Enabled	Identifies an enabled Page Up button.
	Double down arrows (disabled)	Diary_PageDown_Disabled	Identifies a disabled Page Down button.
	Double up arrows (disabled)	Diary_PageUp_Disabled	Identifies a disabled Page Up button.

Process of Managing the Function Space Diary

This topic lists the tasks that sales representatives, event managers, and revenue managers perform to manage the Function Space Diary. Your company might follow a different process according to its business requirements.

To view information in and manage bookings from the Function Space Diary, perform the following tasks:

- *Storing User Preferences for the Function Space Diary*
- *Navigating to the Function Space Diary*
- *Changing the Way Information Is Displayed in the Function Space Diary*

- *Navigating Within the Function Space Diary Time Range*
- *Querying in the Function Space Diary*
- *Moving Objects in the Function Space Diary*
- *Changing Bookings in the Function Space Diary*
- *Viewing Floor Plans in the Function Space Diary*
- *Printing a Function Space Diary View*

Storing User Preferences for the Function Space Diary

You can select and store your preferred default settings for information display controls in the Function Space Diary.

This task is a step in *Process of Managing the Function Space Diary*.

To store user preferences for the Function Space Diary

1. Navigate to the User Preferences screen, Function Space Diary view.
2. In the Function Space Diary form, complete the fields to specify your default settings.

   Some fields are described in the following table.

Field	Comments
Time Scale	Time intervals displayed in the diary views. For information about the selection options, see *Changing the Way Information Is Displayed in the Function Space Diary*.
Display	Enables you to change the information that is displayed in the Booking Bar in the Diary. For information about the selection options, see *Changing the Way Information Is Displayed in the Function Space Diary*.
Color Display By	Select a color scheme set up by the administrator in which to display bookings. For information about the selection options, see *Changing the Way Information Is Displayed in the Function Space Diary*.
Start Time	Time at which the diary display begins. Applies to the Time Scale settings by Day only, for example, Day/Hour, Day/Day-Part, Day/Half-Hour, and Day/Quarter-Hour.
End Time	Time at which the diary display ends. Applies to the Time Scale settings by Day only, for example, Day/Hour, Day/Day-Part, Day/Half-Hour, and Day/Quarter-Hour.
Turn Times	Select to display the setup and tear-down times in the pattern set up by the administrator. Clear to show all bookings without turn-time indicators. However, warnings of turn-time conflicts are still displayed.
Config Space Pattern	Select to display booked, configured spaces in a diagonal pattern.

Field	Comments
	Note: It is recommended that you use different patterns for Config Space Pattern and Turn Times because both fields might be selected at the same time.
Function Space Column Size	Enter a value higher or lower than 100 to increase or decrease the width of the function space column next to the diary calendar. 100 represents the default width of the column in pixels. For example, if you change the value to 75, the column narrows to 75 pixels. Likewise, if you change the value to 120, the column widens to 120 pixels. **CAUTION:** Do not change the value to 0 or to a low number such as 1. If you do, then the function space column disappears.
Function Space Type	Select the default option that you want to display in the Function Space Type field of the diary. For information about the selection options, see *Changing the Way Information Is Displayed in the Function Space Diary*.

3. Click Save.

Navigating to the Function Space Diary

You can navigate to the Function Space Diary from multiple screens and views in the Hospitality application, which are listed in the following table.

To Navigate from This Screen and View...	Follow This Procedure
Functions screen, Functions List view	*Navigating to the Function Space Diary from the Functions Screen*
Quotes screen, Functions view	*Navigating to the Function Space Diary from the Quotes Screen*
Property screen, Total Availability view Property screen, Total Group Availability view Property screen, SR Type Availability view	*Navigating to the Function Space Diary from the Property Screen*
Property Pricing Admin screen, Out of Order view Property Pricing Admin screen, Unavailable view	*Navigating to the Function Space Diary from the Property Pricing Admin Screen*

To Navigate from This Screen and View...	Follow This Procedure
Function Space Diary screen, Function Space Diary view	*Navigating to the Function Space Diary from the Function Space Diary Screen*

This task is a step in *Process of Managing the Function Space Diary*.

Navigating to the Function Space Diary from the Functions Screen

To navigate to the Function Space Diary from the Functions screen, follow this procedure.

To navigate to the Function Space Diary from the Functions screen

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for the function.
3. In the Function record, click the link in the Date field.

   The diary displays the property record associated with the function and the selected date.

Navigating to the Function Space Diary from the Quotes Screen

To navigate to the Function Space Diary from the Quotes screen, follow this procedure.

To navigate to the Function Space Diary from the Quotes screen

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Function list, select the function, and then click the link in the Date field.

   The diary shows the property record and the selected date.

Navigating to the Function Space Diary from the Property Screen

To navigate to the Function Space Diary from the Property screen, follow this procedure.

To navigate to the Function Space Diary from the Property screen

1. Navigate to the Property screen.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the property Name field.
4. Perform one of the following actions:
   - Click the Total Availability view tab.
   - Click the Total Group Availability view tab.
   - Click the SR Type Availability view tab.
5. Click Go to Diary.

   The diary shows the property record and the current date.

Navigating to the Function Space Diary from the Property Pricing Admin Screen

To navigate to the Function Space Diary from the Property Pricing Admin screen, follow this procedure.

To navigate to the Function Space Diary from the Property Pricing Admin screen

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Perform one of the following actions:
   - Click the Out of Order view tab, select the record, and then click the link in the Start Date Time field.
   - Click the Unavailable view tab, select the record, and then click the link in the Recurr Start Date field.

   The diary shows the property record and the selected date.

Navigating to the Function Space Diary from the Function Space Diary Screen

To navigate to the Function Space Diary from the Function Space Diary screen, follow this procedure.

To navigate to the Function Space Diary from the Function Space Diary screen

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab.
   For more information about the diary views, see *Function Space Diary Views*.

Changing the Way Information Is Displayed in the Function Space Diary

You can change the way that information appears in the Function Space Diary with field entries and buttons.

This task is a step in *Process of Managing the Function Space Diary*.

To change the way information is displayed in the Function Space Diary

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Total Availability, or Compact Diary.
4. Complete the fields between the view tabs and the diary, as required.
   Some fields are described in the table that follows.

Field	Comments
Start Date	The date to which the information currently displayed in the diary relates. You can enter a new date to change the day for which information is displayed in the diary.

Field	Comments
Time Scale	Enables you to change the time intervals displayed in the diary views. You can display the selected date in quarter-hour intervals, hour intervals, and so on. For more information about the selection options in this field, see *About the Function Space Diary Time Scale Options*.
Display	Select an option to show different information as labels on the booking indicator bars. When you change the display option, all bookings show the selected label. For example, if you select Setup Style, then all the bookings appear with the setup style information. The previous display label becomes part of the information included in the ToolTip. This field also enables you to change the information included in the function summary ToolTips. For example, an event operations associate might be interested in setup styles, a chef might be interested in meal time periods, and a revenue manager might want to view function types. **Note:** You can change the abbreviated text displayed in the function summary ToolTips by editing the attributes in the Property Administration screen, Abbreviations view. For example, adding a display option called Function Type/ Number of Attendees might use the following abbreviation for a wedding with 200 attendees, set up with round tables: WED/200/RNDS.
Color Display By	Select the basis for how booking colors are displayed. This selection helps you to see the differentiations between bookings. The color scheme options are as follows: - **Inventory Status**. Displays booking colors for inventory status values as defined in the Function Space Administration screen, Function Space Diary Administration view, Function Color Schema list. For more information, see *Defining Status Color Schemes for the Function Space Diary*. - **Function Status**. Displays booking colors for function status values as defined in the Function Space Administration screen, Function Space Diary Administration view, Function Status Color Schema form. - **Quote Status**. Displays booking colors for quote status values as defined in the Function Space Administration screen, Function Space Diary Administration view, Quote Status Color Schema form. **Note:** Bookings that are not marked Reserved are always displayed in the colors defined in the Function Space Administration screen, Function Space Diary Administration view, Function Color Schema form. This does not change with the selection in the Booking Color Scheme field.
Turn Times	Select to display the setup and tear-down times, using the pattern set up by the administrator. Clear to show all bookings without turn-time indicators. However, warnings of turn-time conflicts are still displayed.
Config Space Pattern	Select to identify booked spaces that are configured spaces by a diagonal pattern.

Field	Comments
	Note: Oracle recommends using different patterns for the Config Space Pattern flag and the Turn Times flag because both check boxes can be selected at the same time.
Go To	Enter a function space that you want to display in the visible portion of the diary. The specified function space appears as the first row in the display, except if it is near the end of the list. In this case, the specified function space appears within the display, with the last function space at the end. This field accepts only alphanumeric characters. No special characters are permitted except the asterisk icon (*), which is processed as a wildcard character. Entries are case-sensitive by default. You can control case-sensitivity by changing the value of the Ignore Case Sensitivity applet user property. This user property is defined in the TNT SHM Compact Function Space Diary and TNT SHM Function Space Diary applets.
Function Space Type	Select one of the following options to display or hide function spaces with Special Location status: o **All.** Default. Displays all function spaces whether or not they have Special Location status. o **Specific Space.** Displays only those function spaces that do not have Special Location status. o **Special Location.** Displays only those function spaces that have Special Location status. For more information about designating Special Location function spaces, see *Creating Indivisible Specific Spaces*.

5. Click Go to apply the changes to the diary.
6. Click the buttons between the view tabs and the diary, as required.

   Some buttons are described in the table that follows.

Button	Function
Expand All	Show data in the diary. Users can view the entire hierarchy of categories and the specific space of each category.
Collapse All	Hide data in the diary. Users can view overflow bookings, like category bookings that could not be temporarily assigned or options on categories and overbookings on categories, and then reassign the bookings. The overflow bookings can then be positioned against an unassigned category or specific space.
Dates/Notes	View all notes for the day, to understand availability in the context of any special comments or special dates. The dates and notes that are displayed in the dialog box

Button	Function
	when a user clicks this button are restricted to those that correspond to days that the user sees in the diary.

About the Function Space Diary Time Scale Options

The selection options in the Time Scale field of the diary are as follows:

- **Day/Day-Part.** Displays the diary views with the time axis for each day divided into the various day parts, such as morning, lunch, afternoon, and evening. Administrators set up the day parts in the Property Administration screen, Day Parts view. For more information about setting up day parts, see *Setting Up Property Day Parts*.
- **Day/Hour.** Displays the diary views with the time axis for each day divided into hourly intervals.
- **Day/Half-Hour.** Displays the diary views with the time axis for each day divided into half-hour intervals.
- **Day/Quarter-Hour.** Displays the diary views with the time axis for each day divided into quarter-hour intervals.
- **Month/Day.** Displays the diary views with the time axis divided into 30 days.
- **Month/Day-of-Week.** Displays the diary views with the time axis divided into two four-week periods, with each period subdivided into four parts, each showing the same day for four consecutive weeks. For example, if the date selected as the Start Date value is a Monday, the time axis shows eight consecutive Mondays, starting with the specified date.
- **Month/Day-of-Week/Day Part.** Displays the diary views with the time axis showing the same day for eight consecutive weeks, with each day divided into the various day parts, such as morning, lunch, afternoon, and evening.
- **Week/Day.** Displays the diary views with the time axis divided into eight consecutive days, starting with the day on which the specified start date falls.
- **Week/Day/Day Part.** Displays the diary views with the time axis divided into eight consecutive days, starting with the day on which the specified start date falls. Each day shows the various day parts, such as morning, lunch, afternoon, and evening.

Navigating Within the Function Space Diary Time Range

You can navigate within the Function Space Diary views to reach any required date and time period, moving in increments of one day or one week or back or forward.

This task is a step in *Process of Managing the Function Space Diary*.

To navigate within the Function Space Diary time range

1. Navigate to the Function Space Diary screen.
2. Select a property and date for which you have a record.
3. Choose an appropriate time scale from the Time Scale drop-down list (for example, Week/Day) and then click the Go button.

   The Function Space Diary displays your selected date as the first date in the view.
4. Move backward and forward in the diary by using the paging buttons.

The paging buttons are located on the side of each diary view, after the view tabs bar. The buttons are described in the table that follows.

Button	Function
Next column	Move forward one day at a time.
Previous column	Move backward one day at a time.
Next column set	Move forward one week at a time.
Previous column set	Move backward one week at a time.

Note: When the diary displays a Month/Day-of-Week time scale, the paging buttons behave in a slightly different manner. For more information, see *Navigation for the Month/Day-of-Week Time Scale*.

Navigation for the Month/Day-of-Week Time Scale

When the Month/Day-of-Week option is selected in the Time Scale field, the information in the diary view changes to display instances of that particular day of the week. This change in the diary view slightly alters the behavior of the paging buttons.

For example, if the Start Date is 1/1/2012, which is a Sunday, then eight instances of Sunday are displayed in the diary view, January 1, 8, 15, 22, and 29, and February 5, 12, and 19. In this case, the paging buttons display the following behaviors:

- When you click Next column, the view changes to display eight instances of Monday, starting with January 2.
- When you click Previous column, the eight instances of Sunday reappear.
- When you click Next column set, the diary advances one week to display the appropriate day of the next week. The diary displays January 8, 15, 22, and 29, and February 5, 12, 19, and 26.
- When you click Previous column set, the diary moves backward one week to redisplay the previous eight instances of Sunday, starting with January 1.

Querying in the Function Space Diary

Through the Function Space query assistant, you can create queries that are based on booking as well as function space attributes. The query assistant is available in each diary view. When you run a query, the diary changes to display only the information determined by the query criteria. Dependency bookings are also indicated within the diary when possible.

The following specific tasks are described in this topic:

- *Querying for Related Function Spaces*
- *Clearing Query Parameters from the Diary Views*

Many additional query operations can be performed in the diary. Some of these operations are described in *About Querying in the Function Space Diary*. For more information on using the query assistant, see *Siebel Fundamentals* .

This task is a step in *Process of Managing the Function Space Diary*.

Querying for Related Function Spaces

You can run a query that displays not only the particular function space that meets your criteria but also any related function spaces. For example, consider a function space named Salon A, which includes Salon AB, Salon AC, and Salon ABC. If you run a query that returns Salon A, then you can choose to also show Salon AB, Salon AC, and Salon ABC.

To query for related function spaces

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Total Availability, or Compact Diary.
4. From the selected view, enter the required start date, and then click Go.

   Alternatively, you can specify the start date within the query assistant.
5. On the view toolbar, click Query to display the query assistant.
6. Enter your criteria in the Function Spaces section, and then click Go.

   The function space most suitable for your requirements appears.
7. On the view toolbar, click the menu button, and select Enable Query for Related Spaces.

   The diary changes to display any function spaces that are related to the returned function space.
8. To disable queries for related function spaces, from the diary view, click Menu, and choose Disable Query for Related Spaces.

   If you have already run a query, then the diary changes to display only the original function space returned, hiding the related spaces from the view.

Clearing Query Parameters from the Diary Views

When you perform a query in the diary, the bookings and function spaces are filtered to show only those items that meet your query criteria. In other words, the diary shows only a subset of all available information. To display all possible bookings and function spaces for the selected date and property, you can remove query filtering from the views.

To clear the query parameters from the diary views

1. Click the Query button on the diary view toolbar.
2. In the Query Assistant dialog box, click the Clear button.

   All the query fields are cleared.
3. Click Go to perform a blank query.

   The diary views now show the unfiltered information.

About Querying in the Function Space Diary

The query assistant is divided into two sections, Functions/Bookings and Function Spaces. You can enter query parameters into either or both of the sections. If you enter query parameters into both sections, then the results returned must meet the criteria specified in both sections.

When you enter criteria in any of the sections, you can use the Boolean operators AND or OR. If you use AND, then the bookings or function spaces returned must meet all specified criteria. If you use OR, then bookings or function spaces that meet any of the criteria are returned.

Booking and Function Queries

Users can create queries that filter bookings on the basis of the following criteria:

- General booking attributes (noise, detailing, and so on)
- Booking status (overbooked, optioned, shifted, and so on)
- Booking relationship type (affiliate, host, and so on)
- Booking activity (backup or active)
- Specific space or a category booking
- Quote-related attributes (business type, account, sales representative, and so on)
- Operational attributes (setup style, function type, meal time period, and so on)

Function Space Queries

In addition to querying for specific bookings, you can also query for function spaces that meet certain criteria. For example, you can query for only those function spaces that have Internet connections or that have a specific capacity.

Combination Booking and Function Space Queries

You can use the query assistant to display certain types of bookings for a specific subset of function spaces. For example, you can enter parameters in the booking section so that, for example, only backup bookings appear. You can then enter parameters in the function space section so that, for example, only function spaces with a physical area greater than 20 square meters are displayed.

Moving Objects in the Function Space Diary

Users can perform many move operations in any view of the Function Space Diary. The descriptions in this topic illustrate typical move operations, as follows:

- *Moving a Booking to a Different Time or Function Space*
- *Converting Between Specific Space Bookings and Category Bookings*
- *Optioning and Overbooking a Specific Space*
- *Moving Space Hold Bookings*
- *Problems Moving Bookings with Backup Spaces to New Times*
- *Moving Bookings with Backup Spaces to New Spaces*
- *Exchanging Specific Space Bookings*
- *Extending Bookings*
- *Restrictions on Moving Bookings*

This task is a step in *Process of Managing the Function Space Diary*.

Moving a Booking to a Different Time or Function Space

Users can select and (without releasing the selection) move a booking to a different time, select and (without releasing the selection) move a booking within the same time period to a different function space, or select and (without releasing the selection) move a booking to a new function space at a different time.

To move a booking to a different time or function space

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Compact Diary, or Total Availability.
4. In the selected view, enter the required start date and time scale, and then click Go.
5. Select the booking that you want to move to a new location within the diary and, without releasing the selection, then move the booking to the new location (and release the selection).

   The Select Reservation to Move dialog box appears.

   While moving the booking, you can scroll horizontally or vertically at the same time.
6. In the Select Reservation to Move dialog box, complete the fields, as required.

   The Select Reservation to Move dialog box enables you to fine-tune and confirm the move operation. Some fields are described in the following table.

Field	Comments
To	Select the function space to which the function space is moving. If you drop the booking on a space that is part of a configured space, then the selection options include all the spaces that are components of that configured space. Otherwise, this field displays only the specific space on which you have dropped the booking.
Start Time	Starting time of the function. By default, displays the beginning time on which the booking has been dropped. You can modify the new starting time of the booking by changing this time.
End Time	Ending time of the function. By default, displays the end time on which the booking has been dropped. You can modify the new ending time of the booking by changing this time.

7. Click OK to confirm the changes to the booking.

Converting Between Specific Space Bookings and Category Bookings

This topic describes how to convert a specific space booking into a category booking.

To convert a specific space booking into a category booking

- Select and (without releasing the selection) move the specific space booking to the category bar.

The booking is temporarily assigned and shown against the specific space if possible. If the booking is not assigned, then it still appears under the category bar.

Temporarily assigned category bookings can be converted to specific space bookings by selecting and (without releasing the selection) moving the category bookings to the specific space. Category Overflow bookings that are moved to a specific space are automatically converted to specific space bookings.

Optioning and Overbooking a Specific Space

This topic describes how to option or overbook a specific space.

To option or overbook a specific space

- Select and (without releasing the selection) move a specific space booking to another booking, such as a specific space or a dependency.
  A dialog box appears notifying you that the selected function space time conflicts with an existing booking.

Optioning and Overbooking a Specific Category

This topic describes how to option or overbook a specific category.

To option or overbook a specific category

- Select and (without releasing the selection) move a booking to the category bar.
  The booking is automatically reserved and assigned if possible. If the booking cannot be reserved, then a dialog box appears notifying you that a conflict exists.
  In both of these cases, you can change the booking to an option, overbook, or cancel the change by clicking the appropriate buttons (Overbook, Option, Cancel) in the dialog box. You can also click OK to acknowledge that the booking was unsuccessful and allow it to be unreserved.

Moving Space Hold Bookings

You can select and (without releasing the selection) move bookings within a detailed function or a space hold function. For example, Salon ABCD has been detailed, and it has a booking in Salon A. The booking in Salon A can be moved to a different salon within Salon ABCD or to a different time within the start and end times of the detailed function. You can also select and move existing bookings out of a space hold or into a space hold.

You can promote a subfunction to a function by selecting and moving it out of a space hold, which breaks the child-to-parent dependency of the subfunction. Conversely, you can select and move a function onto a detailed function to make it a subfunction of the detailed function.

Restrictions That Apply to Moving Space Hold Bookings

The following restrictions apply to selecting and (without releasing the selection) moving space hold bookings:

- Select and move works only for subfunctions. You cannot select and move a parent detailed function or a space hold function.
- Selecting and moving can occur only if the Time Scale is set to Day/Hour.
- The entire function must be within the time period of the space hold for it to be part of the space hold.
- If a function is moved into or out of a space hold, then the corresponding relationships (that is, parent and child) are reflected in the function lists. For example, if you select and move a subfunction out of a detailed

function, the subfunction is no longer part of that detailed function. Consequently, in the Quote screen, Functions view, any subfunction you selected and moved in the diary is no longer displayed under the detailed function.

- A space hold function holds space for a specific quote. Therefore, you cannot select and move functions belonging to a different quote into a space hold. If you can successfully option or overbook the function space time for the active booking, then the backup space is also moved to the new time. All functions within a space hold must belong to the quote for which the space hold was created.

Problems Moving Bookings with Backup Spaces to New Times

When you move an active booking to a new time period, the backup space must also be able to move to the new time for the booking to be successful. When you successfully select and (without releasing the selection) move an active booking to an available time period, the backup booking moves with it. However, if the move is not successful, then one of the following might have occurred:

- **Backup space is unavailable for the new time period.** If the active space can be moved but the backup space is unavailable for the new time period, then a dialog box appears allowing you to option, overbook, cancel, or unreserve the booking.
- **Active booking cannot be moved due to conflicts.** If the active booking cannot move to the new time period due to conflicts, then a dialog box appears allowing you to option, overbook, cancel, or unreserve the booking. If you click OK, then both the active and the backup bookings are unreserved.
- **Conflict with the backup booking.** If a conflict occurs when you try to move the backup booking, then you can try overbooking or optioning the backup space time in the dialog box that appears. However, if this attempt is unsuccessful, then you must unreserve the backup booking or cancel the change.

Moving Bookings with Backup Spaces to New Spaces

When moving active bookings to a new function space, Siebel Hospitality verifies whether the new function space also requires a backup space. Four outcomes are possible:

- If the new space does not require a backup space and the function space is available for the active booking, then a dialog box appears asking whether or not to keep the backup space booking. Depending on your selection, the backup space booking is reserved or unreserved.
- If the new space does not require a backup space and the function space is unavailable for the active booking, then you can try overbooking or optioning the function space in the dialog box that appears. If the function space can be optioned or overbooked, then you can select whether or not to keep the associated backup space booking. If it is not possible to option or overbook the function space, then you must unreserve the active booking or cancel the change.
- If the new space requires a backup space and the function space is available for the active booking, then a dialog box appears asking whether or not to keep the backup space booking. Depending on your selection, the backup space booking is reserved or unreserved.
- If the new space requires a backup and the function space is unavailable for the active booking, then you can try overbooking or optioning the function space in the dialog box that appears. If the function space can be optioned or overbooked, then you are asked whether you want to keep the associated backup space booking. If it is not possible to option or overbook the function space, then you must unreserve the active booking or cancel the change.

Exchanging Specific Space Bookings

This topic describes how to exchange specific space bookings.

To exchange specific space bookings

- To exchange specific space bookings, for example exchange Space A and Space B, select and (without releasing the selection) move Space A onto Space B.

  Space B becomes either optioned or overbooked. You can then select and (without releasing the selection) move Space B to the place previously occupied by Space A.

Extending Bookings

This topic describes how to extend a booking.

To extend a booking

1. Select and (without releasing the selection) move either end of the indicator bar of the booking to extend the booking into a later or an earlier time period as required.
2. Use the ToolTip to check the precise time period to which you have extended the booking.

Restrictions on Moving Bookings

You cannot perform the following operations with bookings:

- Select and (without releasing the selection) move a booking to a position that has no y-axis bar.
- Select and (without releasing the selection) move a booking to a specific space that does not accommodate the setup style of the booking.
- Select and (without releasing the selection) move a booking with a turn time that overlaps with the turn time of another booking.
- Select and (without releasing the selection) move a booking to an ineffective specific space or category.
- Select and (without releasing the selection) move an active booking that has an associated backup booking to another function space.

  However, you can select and (without releasing the selection) move a backup booking to a different function space.
- Select and (without releasing the selection) move a backup booking to a different time period.
- Select and (without releasing the selection) move an active booking to a time period occupied by another booking.
- Select and (without releasing the selection) move a function that is scheduled in a reserved suite to a different function space.

Changing Bookings in the Function Space Diary

You can change bookings directly from the Function Space Diary by using the following procedures:

- *Assigning Category Bookings to Specific Spaces*
- *Deleting Out of Order and Unavailable Designations from Function Spaces*
- *Changing Booking Inventory Statuses*

Note: Administrators can customize Siebel Hospitality to allow users to block function spaces directly from within the Function Space Diary. For this purpose, the following parameters are available in the eHospitalityObjMgr_enu.log file: Function Space Name, Property Name, and Date and Times.

This task is a step in *Process of Managing the Function Space Diary*.

Assigning Category Bookings to Specific Spaces

If a revenue manager is satisfied with the specific space assignments that are displayed in the diary, then the manager can convert all category bookings for the day into specific space bookings. The function space inventory engine automatically accounts for new bookings as well as existing bookings and assigns the category bookings to the specific spaces.

By default, space and time optimization is enabled for assigning bookings to specific spaces. However, if large numbers of function spaces are available for the current property, then space and time optimization can slow the assigning process significantly, and the assignment can take several minutes to complete. In such circumstances, it might be more practical to disable space and time optimization.

You can disable or enable space and time optimization only when the time scale selected is Month/Day-of-Week or Week/Day. When the other time scales are selected, space and time optimization is enabled by default, and the menu options are not available.

To assign category bookings to specific spaces

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Compact Diary, or Total Availability.
4. In the selected view, enter the required start date and time scale (Month/Day-of-Week or Week/Day), and then click Go.
5. On the view toolbar, click the Menu button, and do one of the following:
    - Choose Disable Space/Time Optimization.
    - Choose Enable Space/Time Optimization.
6. Click Assign to assign the category bookings to specific spaces.

Deleting Out of Order and Unavailable Designations from Function Spaces

You can delete Out of Order and Unavailable function space designations by using the following procedure.

To delete an Out of Order or Unavailable designation from a function space

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Compact Diary, or Total Availability.
4. In the selected view, enter the required start date and time scale, and then click Go.
5. Perform one of the following operations:
    - Right-click the function space designated as Out of Order, and choose Delete from the context menu.

Siebel Hospitality refreshes the display, and the function space is no longer labeled as Out of Order. If you delete an Out of Order designation from the diary, then this information is also removed from the property pricing records.

- Right-click the function space designated as Unavailable, and choose Delete for either the specific occurrence or the entire series from the context menu.

  Siebel Hospitality refreshes the display, and the occurrence or series is removed from the diary. If you delete an entire series from the diary, then this information is also removed from the property pricing records.

Changing Booking Inventory Statuses

Booking inventory records can be updated directly from within the diary views.

To change a booking inventory status

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Compact Diary, or Total Availability.
4. In the selected view, enter the required start date and time scale, and then click Go.
5. To make status changes, perform one or more of the operations described in the following table.

To Make This Status Change	Perform This Action	Result
Unreserve a reserved booking	Right-click the booking, and choose Unreserve.	The booking is removed from the diary views and the inventory status changes to Unreserved.
Assign a specific space booking to a category	Right-click the booking, and choose Assign to Category.	The booking changes color to indicate that it is no longer assigned to a specific function space.
Assign a category booking to a specific space	Right-click the booking, and choose Assign to Specific Space.	The booking changes color to indicate that it is no longer assigned to a category.
Overbook an optioned booking	Right-click the booking, and choose Overbook.	The booking changes color to indicate that it is overbooked.
Option an overbooked booking	Right-click the booking, and choose Optioned.	The booking changes color to indicate that it is not overbooked.
Unreserve an optioned or overbooked booking	Right-click the booking, and choose Unreserve.	The indicator bar split is removed, and the booking is displayed as Reserved.

To Make This Status Change	Perform This Action	Result
Unreserve a reserved booking on the same indicator bar as an optioned booking	Right-click the booking, and choose Unreserve.	The split is removed from the indicator bar, and it changes color to indicate that the inventory status has changed to Option Reserved.
Reserve an unreserved booking on the same indicator bar as an overbooked booking	Right-click a reserved booking on the same indicator bar as an overbooked booking, and choose Unreserve.	The split is removed from the indicator bar, and it changes color to indicate that the inventory status has changed to Reserved.
Accept an option reserved booking	Right-click the booking, and choose Reserve.	The booking inventory status changes to Reserved.
Reject an option reserved booking	Right-click the booking, and choose Unreserve.	The booking is removed from the diary views, and the inventory status is changed to Unreserved.

CAUTION: When optioned and overbooked bookings are created, the indicator bar is split vertically to display different bookings for the same function space and time period. Make sure that you right-click the correct booking and not another booking on the same indicator bar. Otherwise, you might change the status of the wrong booking.

Viewing Floor Plans in the Function Space Diary

This topic describes how to view floor plans in the Function Space Diary.

This task is a step in *Process of Managing the Function Space Diary*.

To view floor plans in the Function Space Diary

1. Navigate to the Function Space Diary screen.
2. In the Property form, query for the property record.
3. To access the views of floor plans, perform the following actions:
    - **Floor plan.** In the Property form, click Floor Plan.

      An image appears depicting the function spaces of the selected property.

      The graphics file image is added as an attachment to the property record. The image can also be viewed on the Property screen by selecting the Floor Plans view tab. Users can choose whether to open the file from the current location or to save a copy on their own computer.
    - **Thumbnail floor plan.** Click the Property form Menu button, and choose Thumbnail Floor Plan.

A thumbnail image appears representing the floor plan. You can select whether to open the file from the current location or to save a copy.

- **Floor plan Web site.** Click the Property form Menu button and choose Floor Plan Website.

  A Web site appears that shows property floor plans.

  > **Note:** The Floor Plan Website option must be configured by an administrator with Siebel Tools before it is available for use, as described in *Configuring the Floor Plan Website Option*.

Printing a Function Space Diary View

You can print any of the charts in the Function Space Diary. To print the information displayed in a diary view, complete the following procedure.

This task is a step in *Process of Managing the Function Space Diary*.

To print a Function Space Diary view

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Total Availability, or Compact Diary.
4. In the selected view, enter the required start date and time scale, and then click Go.
5. Scroll to view the bookings or functions that you want to print.
6. On the view toolbar, click the menu button, and click Print.

   Selecting Print opens Microsoft Word, and the Scheduler chart is copied as an image to the new document. This image displays what can currently be seen in the Function Space Diary.
7. Print the Scheduler chart by using the Print feature of Microsoft Word.

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Managing the Function Space Diary in Siebel Open UI

This chapter describes the features of the Function Space Diary in Siebel Open UI and the procedures that users perform to manage the diary. It includes the following topics:

- *About the Function Space Diary for Siebel Open UI*
- *Process of Configuring the Function Space Diary for Siebel Open UI*
- *Process of Managing the Function Space Diary in Siebel Open UI*

About the Function Space Diary for Siebel Open UI

The *Function Space Diary* (hereafter referred to as *the diary*) is a Scheduler within Siebel Hospitality. Sales representatives, event managers, and revenue managers use the diary to manage day-to-day bookings of function spaces and to optimize event operations. The diary displays the allocation of resources during a specified time period. For example:

- Sales representatives use the diary to verify the availability of function space.
- Event managers use the diary to view the availability and achieve operational efficiency for an event. For example, event managers might use the diary to identify events that have significant food and beverage requirements and relocate those events to function spaces close to the kitchen.
- Revenue managers use the diary to review function-space availability as an indicator of future revenue and to develop recommendations on how function space can be used to bring in additional revenue for the property. Revenue managers also manage the process of assigning category bookings to specific spaces.

The diary shows function space bookings for several time periods and enables event personnel to change the time scale. They can filter the displayed data by start date, time scale, display, turn times, and so on. Color coding indicators differentiate between weekdays, weekends, and holidays.

The following topics describe the functions and components of the diary:

- *Using Function Space Diary Controls in Siebel Open UI*
- *Visibility Rules and the Function Space Diary for Open UI*
- *Function Space Diary Views in Siebel Open UI*
- *Function Space Diary View Elements in Siebel Open UI*
- *Function and Booking Details in the Function Space Diary for Siebel Open UI*
- *Icons in the Function Space Diary for Siebel Open UI*

Using Function Space Diary Controls in Siebel Open UI

The Function Space Diary control view in Siebel Hospitality leverages Siebel Open UI technologies to deliver a UI control for visually representing bookings that can be used by hospitality organizations to manage function space availability. The following table shows the Function Space Diary controls in Siebel Open UI.

Function Space Diary Control	Usage
Menu button	You can use the menu button to invoke additional commands, such as: • **Expand All.** You can select Expand All to expand all resources. • **Collapse All.** You can select Collapse All to collapse all resources. • **Add Function.** You can select Add Function to invoke the add function capability in the Function Space Diary. • **Show Legend.** You can select Show Legend to show the color code legend in the Function Space Diary. • **Hide Legend.** You can select Hide Legend to hide the color code legend in the Function Space Diary. • **Assign.** You can select Assign to assign all category bookings to specific spaces in the Function Space Diary.
Go To Date	You can use the Go To Date feature, by clicking the date hyperlink and entering a date in the past or future and have the scheduler display the bookings for the date range based on the selected time scale. Based on the selected time scale, you can navigate to the day, week, month, or year using the (forward and back) arrows. When using the arrows, the relative horizontal and vertical scroll bar positions and the selected record stay the same.
Go To Search Field	You can use the Go To search field to type in the name of a function space and navigate directly to a function space in the diary. As you type in the name of a function space, you will see all available options in a picklist where you can choose the value you are searching for. Once you select a value, that Function Space displays and the row is highlighted.
Choose Time Scale buttons	You can use the Time Scale buttons to select the time scale you want to see in the Function Space diary. Options include: • Day/Hour (D/H) • Day/DayPart (D/DP) • Week/Day (W/D) • Week/Day/Day Part (W/DP) • Month/Day (M/D) • Month/Day-of-Week/Day Part (M/DW)
Display Group Availability on Time Scale	You can see the group availability on the third axis of the time scale. This axis will display for each day, the Total Group Availability/Group Authorized or just Total Group Available if space is limited and both will not fit. You can also drilldown on the group available, which takes you to the Total Group Availability view.
Function Space Filter Panel	These are the different settings controlled by a sliding panel. You can set different booking display options and filters from the function space filter panel. The first half of this pane contains display options that control how things are seen in the utility pane of the diary, such as, booking types, labels,

Function Space Diary Control	Usage
	colors and patterns. The second half of this panel contains the filter options that filter out the function spaces depending on criteria applied to the filter. You can also use the function space type drop-down menu to select the function space type you want to see in the diary.
Color Code Legend	The color code legend explains color coding of function bookings in the Function Space Diary. The color code legend color information is set in the Function Space Administration screen. Color Code Legend displays the color codes depending on the value selected in the Display By drop-down control under the filter panel.

Visibility Rules and the Function Space Diary for Open UI

The information that can be viewed in the Function Space Diary depends on the user's assigned responsibility and associated visibility rules. The appropriate views must be added to each responsibility. The following table outlines the user responsibilities and the type of records that users are able to access according to the visibility rule associated with each responsibility.

In the diary, each user is given the maximum visibility by default. For example, if a property user goes to a diary view, then this user can view bookings only for the property assigned to him.

User	Visibility Rule
Property user	Users who have a specific property assigned to them can see only bookings relating to that particular property. For more information about property users, see *Assigning the Property Team*.
Cluster user	Users who are members of a specific cluster can see only bookings that relate to that particular cluster. For more information about cluster users, see *Assigning Clusters to a User*.
Administrator	Administrators can see bookings for all appropriate organization properties.

Clusters can be used to prevent users at one hotel from gaining an inappropriate competitive advantage by viewing the Function Space Diary of another hotel in the same chain. Typically, users (for example, sales representatives) can view diary information for their own assigned properties as well as any properties assigned to a cluster with which their login ID is associated. For more information about clusters, see *Process of Setting Up Property Clusters*. Administrators can usually view diary information for properties in all organizations. For more information on adding views to user responsibilities, see *Using Siebel Tools* .

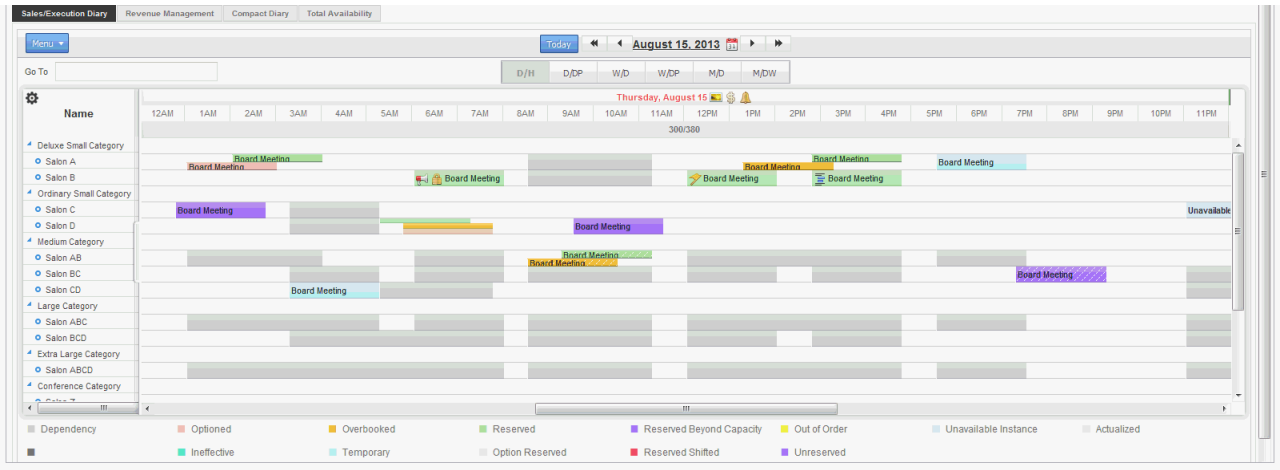
Function Space Diary Views in Siebel Open UI

The Function Space Diary screen displays the Property form first, followed by the view tabs. The Property form shows the name and type, the number of function rooms, and number of sleeping rooms for the first property record. From the form, users can query for a different property.

Note: The diary does not display the associated functions for nonparticipating properties. If users query for a nonparticipating property within the Function Space Diary, then the views are empty. For more information about nonparticipating properties, see *Adding Property Records*.

Function Space Diary Sales/Execution Diary View in Siebel Open UI

The Sales/Execution view is the default view for the diary. Most of the function booking information that sales representatives and event managers require appears in this view. The following image shows the one-day time scale in the Function Space Diary.



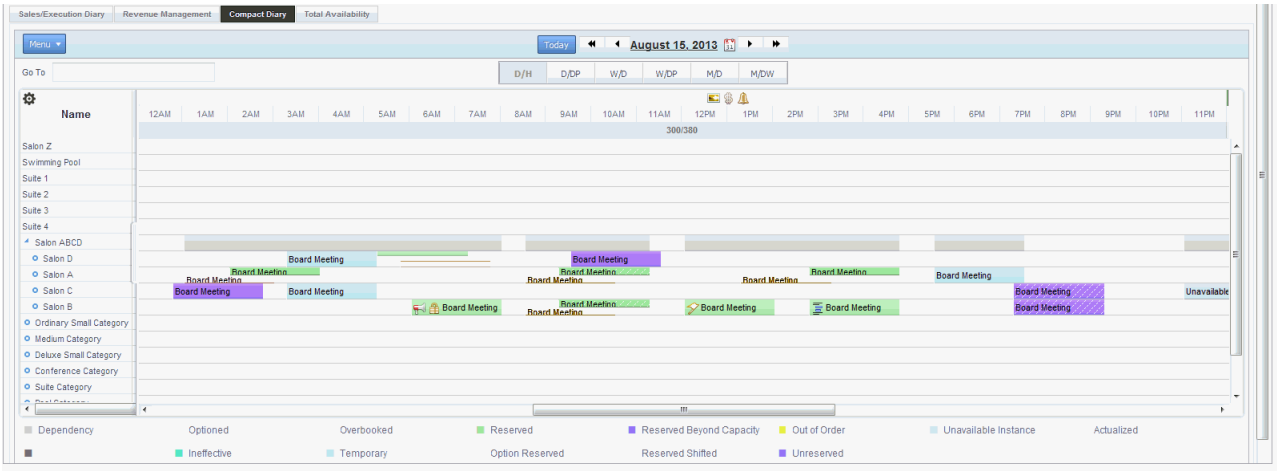
Function Space Diary Revenue Management View in Siebel Open UI

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

The Functions information shown in this diary view is similar to the list that appears on the Functions screen. From this view, users can update and copy function records, reserve and start the best-fit process, and overbook, option, and cancel functions. For more information on performing any of these actions, see *About Managing Functions at the Quote Stage*.

Function Space Diary Compact Diary View in Siebel Open UI

The Compact Diary view, as shown in the following image, is used to display function spaces in a more compact form.



Unlike the other diary views, the function spaces are not grouped according to category but instead are grouped according to their parent-child relationships (biggest parent, smallest child on the resource pane). This view can be useful when a property contains large numbers of function spaces. For example, if a property has a large function space called Salon ABCD, which is formed by connecting Salons A, B, C, and D, then each of these salons is displayed under the biggest parent, Salon ABCD, in the Compact Diary view.

When you click the Menu button, you can expand or collapse the parent-child relationships by selecting the Expand All and Collapse All options.

All indivisible function spaces are also listed in the Compact Diary view. They appear separately according to parent-child relationships and within the *compact sequence,* which is the order of display.

The function spaces can be displayed in a particular order in the Compact Diary view. This compact sequence is configured using the Property Administration screen, Specific Space view and Category view.

As with the other diary views, users can select and (without releasing the selection) move bookings onto different function spaces and time periods within the Compact Diary view. However, unlike the other diary views, when users attempt to select and move a booking, they must confirm their action by selecting the appropriate function space from the Pick Function Space dialog box that appears. The Pick Function Space dialog box shows only function spaces that are related to the space where users are moving the function.

Bookings that are made using configured function spaces are displayed as separate indicator bars within the Compact Diary view to show that each of the function spaces is in use at a particular time. For example, a function is booked in Salon ABC. Within the Compact Diary view, an indicator bar appears adjacent to each of these function spaces for the appropriate time period. Salon A, B, and C have the same function name outlined against their individual indicator bars.

Function Space Diary Total Availability View in Siebel Open UI

The Total Availability view is used to display function bookings in the context of inventory displays. In addition to all the information contained in the Sales/Execution Diary view, this view also shows total sleeping room availability. Sleeping room availability information appears in the Total Group Availability list.

The date fields in the various sections of the view interact in the following ways:

- On the Scheduler, when you complete the Start Date field and click Search, or click the arrow buttons, the first date in the Total Group Availability list changes to match the Start Date field value.
- On the Scheduler, when you move the horizontal scroll bar, the date range of the Total Group Availability list is affected.

- In the Total Group Availability list, when you change the dates either by querying or by clicking the arrow buttons, the Start Date field value on the Scheduler does *not* change to match the changes to the Total Group Availability dates.

Users can review sleeping room availability from the Function Space Diary by clicking on Group Availability on third axis of the time scale (Total Availability).This action takes the user to the Property screen, Total Availability view, which shows property availability records starting from the selected date. Unlike the Total Availability view of the diary (which shows only the Total Group Availability), the Property screen, Total Availability view shows total, group, and transient availability.

Function Space Diary View Elements in Siebel Open UI

In the image shown in *Function Space Diary Sales/Execution Diary View in Siebel Open UI*, the Function Space Diary shows current bookings, overbookings, optioned bookings, and dependency bookings represented by bars that extend horizontally along the segments of the selected time period (utility pane). The predefined color and patterns assigned to each bar represent the inventory status, setup time, and tear-down time of the function and are controlled by the option chosen from Display By drop-down menu. When space permits, the indicator bar displays booking information. The information displayed on the indicator bar is specified by the option chosen from the Label drop-down list.

Each category and its component-specific space is shown on the resource pane. Users can expand or collapse individual categories by clicking the arrow to expand or collapse the folder and show its contents. The categories and specific spaces are displayed according to the Display Sequence specified within the Property Administration screen, Category view and Specific Space view, respectively.

When the mouse pointer is positioned on the category or specific space name, the name is highlighted and underlined. If users click the resource name link, then they are brought to the Administration-Product screen, Product view, where the specific resource is displayed.

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

By scrolling horizontally, users can see the bookings for the same function space for specific time periods. This capability is useful for reviewing past dates with actualized bookings to compare availability at a similar season in the past.

> **Note:** After users leave the diary and return by clicking Back, the time scale of the diary changes back to the default values. For example, the default time scale value is Day/Hour. A sales representative selects the Week/Day time scale option to view information, navigates away from the Function Space Diary view, and then returns by clicking Back. When the diary is displayed again, the information appears in the Day/Hour time scale.

Function and Booking Details in the Function Space Diary for Siebel Open UI

Color-coded indicator bars and icons are used to indicate different types of functions and bookings. For more information about icon usage in the diary in the Function Space Diary, see *Icons in the Function Space Diary for Siebel Open UI*.

Color-Coded Day Indicators

Color-coded indicators differentiate between weekdays and weekends in the Function Space Diary. Holiday and Special Events do not have background color displayed, rather, the date is highlighted in the time scale pane. Users can customize the colors only for weekends in the Function Space Administration screen, using the Weekend Color drop-down menu in the Function Space Diary Administration.

Color Code Legend

The color code legend displays the different colors used to display bookings. The color code legend displays a sample color and a label that displays the color code scheme status. This option is selected in the Display By drop-down menu in the Filter Panel. The legend changes when you change the display settings in the user preferences or when you change the option in the Display By drop-down menu in the Filter Panel and click Set. You can use the Menu button to set the Show Legend and Hide Legend options.

Order of Bookings Displayed in Diary

In the Function Space Diary, bookings are displayed in the utility pane. There are different sorting schemes which control the order of the bookings to be displayed in the utility pane. Overlapping and partially overlapping bookings are displayed in the following order:

- Reserved
- Option Reserved
- Overbooked
- Optioned
- Unreserved
- Unavailable
- Unavailable Instance
- Out of Order
- Temporary

Active and Backup Bookings

If certain function spaces require backup spaces, then an icon is displayed next to the appropriate function space names on the resource pane.

Backup bookings have a dotted line border, while active bookings have a solid line border.

Dependency Bookings

Dependency bookings are displayed in the diary to indicate bookings that affect other function spaces. For example, if a combined space (A and B and C) is booked, then individual spaces A, B, and C have dependency bookings. If, however, AB is booked, then the combined space ABC has dependency bookings.

The color for the dependency bars is defined by the administrator. Users cannot change the dependency bookings. In many cases, dependency bookings can be the result of multiple bookings.

Note: Unreserved functions do not result in a corresponding dependency booking.

Overbookings and Optioned Bookings

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

Out of Order, Unavailable, and Temporarily Assigned Function Spaces

When a function space is set to Out of Order or Unavailable, users can view this information in the Function Space Diary. The color for an Out of Order and Unavailable function space is configured by the administrator. The label shows the booking type (Unavailable or Out of Order) with no setup and tear-down time. Temporarily Assigned category spaces are shown against specific spaces in a color predefined by the administrator.

You can pause the pointer on the unavailable and out of order booking to see more information.

Unreserved Bookings

An unreserved booking is when a function has a function space listed, but the inventory status is Unreserved. Unreserved bookings display in the color set configured by the administrator. Unreserved bookings do not factor into the dependency booking. You can use the Display Options panel to show or hide unreserved bookings. You can also set the show or hide unreserved bookings in either the user preferences or Function Space administration for the initial loading of the Function Space Diary.

Time-Shifted Bookings

A time-shifted booking appears when a bookings has been shifted to a different time period or date, and are indicated by the addition of the word *Shifted* to the function name on the indicator bar. The original booking also appears in the utility pane if the user has not accepted the shift. The Siebel Open UI Function Space Diary supports displaying of unreserved bookings as well, irrespective of booking status, the shifted booking will appear in the diary based on Display option settings.

Effective Start and End Times

If effective start and end times have been added for any function spaces or categories, then these can be viewed in the diary.

Categories and specific spaces are typically removed from the diary view if they are not effective for any of the dates currently displayed. The exception to this is if the dates shown in the diary are within the cached date range of the diary. The diary caches information about a certain range of dates beyond what is currently shown and can begin showing a category or specific space up to approximately a month before it becomes effective. The cached date ranges depend on the Time Scale option that users are using to view the information.

Icons in the Function Space Diary for Siebel Open UI

Icons are used in the diary to identify different types of bookings and function details. Siebel Hospitality provides a default set of icons, which you can customize. For more information about changing the diary icons, see *Configuring the Function Space Diary for Siebel Open UI Icons*.

The highlighted date label on the time scale pane indicates that there is a holiday or sell note or special event.

By default, the diary uses the icons that are shown in the following table.

Icon	Name and Description	Indicates that...	Icon Location
	24-hour hold: A clock with hands.	The current function space has a 24 hour hold. Displayed on the booking indicator bar if space permits.	Function booking icon.
	Noise: A megaphone.	The booking will be noisy and might disturb other guests. Displayed on the booking indicator bar if space permits.	Function booking icon.
	Host booking: Three-person shapes where the one in the middle is in front of the other two in the background.	The booking is a host booking. Displayed on the booking indicator if space permits.	Function booking icon.
	Affiliate booking: Three-person shapes, side by side.	The booking is an affiliate booking. Displayed on the booking indicator bar if space permits.	Function booking icon.
	Specific suite function: A bed.	The booking is a function scheduled in a reserved specific suite used for sleeping.	Function booking icon.
	Related occurrence booking: A first curved line with arrow follows a second curved line with arrow, which in turn follows the first curved line with arrow.	The booking is part of a series of recurring events.	Function booking icon.
	Do not move: A padlock, which is gold.	The booking must not be moved from the specified function space. Displayed on the booking indicator bar if space permits.	Function booking icon.
	Detail: A flag, which is gold.	The booking is a detailed function. Displayed on the booking indicator bar if space permits.	Function booking icon.
	Suite: An armchair.	The booking is for a suite. Displayed on the booking indicator bar if space permits.	Function booking icon.
	Subfunction: Three horizontal bars where the second and third bars are indented like a subfunction.	The booking has subfunctions.	Function booking icon.
	Backup required: A page overlayed with a hazard symbol (exclamation mark).	The current function space requires a backup function space. Displayed next to the function space name on the resource pane.	Resource icon.
	Holiday: A postcard.	The date is a holiday.	Time Scale icon.

Icon	Name and Description	Indicates that...	Icon Location
		This icon appears in all Function Space Diary views except the Month/Day view, where holidays are indicated only by the highlighted (in red color) text.	
	Special event: A bell, which is yellow.	The date has a special event occurring on this date. This icon appears in all Function Space Diary views except the Month/Day view, where special events are indicated only by the highlighted (in red color) date.	Time Scale icon.
	Sell note: A dollar sign.	The sell note is associated with the date. This icon appears in all Function Space Diary views except the Month/Day view, where sell notes are indicated only by the highlighted (in red color) date.	Time Scale icon.

Note: The Month/Day view does not display any function booking icons.

Viewing ToolTips in the Function Space Diary for Siebel Open UI (Users)

This topic describes how to view summary information in the Function Space diary, using ToolTips.

To view a summary of function details through the ToolTip feature

- Position the mouse pointer over an element of the diary display.

  The ToolTip appears. The following table describes some of the ToolTips for different diary elements.

Position the Mouse Pointer over an Element...	A ToolTip Displays the Following...
Function booking	○ Quote Name ○ Function Name ○ Function Space ○ Exp/Proj/Gtd ○ Business Type ○ Function Type ○ Set Up Style ○ Setup Start Time

Position the Mouse Pointer over an Element...	A ToolTip Displays the Following...
	○ Start Time ○ End Time ○ Setup End Time ○ Function Status ○ Meal Period If a sales manager or an event manager has been nominated for the function, then these details can also be included in the ToolTip.
Function space category	○ Physical Area ○ Usable Area ○ Description ○ Setup styles (minimum and maximum capacity)
Individual function space	○ Physical Area ○ Usable Area ○ Description ○ Setup styles (minimum and maximum capacity)

Additionally, if a special event, holiday, or sell note has been activated and attached to a date in the Function Space Diary, the ToolTip for that date displays description information for the item.

Viewing Paused On information in the Function Space Diary for Siebel Open UI (Users)

This topic describes how to view more information in the Function Space diary.

- Position the mouse pointer over an element of the diary display.

  The additional information appears. The following table describes the content of the additional information for different diary elements.

Position the Mouse Pointer over an Element...	More Information Displays the Following...
Function space category	Displays information about the function space or category.
Date	Displays different types of sell notes for that day and descriptions.

Position the Mouse Pointer over an Element...	More Information Displays the Following...
Out of Order or Unavailable	Displays out of order or unavailable time.
Function or Category Booking	Displays details regarding the function or category booking.

Process of Configuring the Function Space Diary for Siebel Open UI

This topic lists the tasks that administrators perform to configure the Function Space Diary. Your company might follow a different process according to its business requirements.

To configure Function Space Diary, perform the following tasks:

- *Configuring Navigation from the Function Space Diary for Open UI to the Quote and Function Views*
- *Configuring the Function Space Diary for Siebel Open UI Icons*

Note: Before the Function Space Diary can be used, an administrator must also define property day parts, function space status indicators, and asset inventory status indicators. For more information, see *Defining Day Parts, Status Indicators, and Setup Style Translations*. Additionally, an administrator must add property floor plans. For more information, see *Setting Up Properties*.

Configuring Navigation from the Function Space Diary for Open UI to the Quote and Function Views

Administrators can use Siebel Tools to configure the Function Space Diary so that users can click a blocked function in the Function Space Diary and navigate to the corresponding quote or function view.

This task is a step in *Process of Configuring the Function Space Diary for Siebel Open UI*.

To configure navigation from the Function Space Diary to the Quote and Function views

1. Start Siebel Tools.
2. Search for the applet that is configured for the Function Space Diary.
3. To configure the Quote view drilldown, create a new drilldown object and set the values in the following table:

Item	Value
Name	Enter a name, for example, Booking Drilldown.

Item	Value
Hyperlink Field	Drill Down
Source Field	Drill Down
View	TNT SHM Quote Function Line Items View
Business Component	Quote
Destination Field	ID

If you use this configuration, then the Date, Time, and Function details are carried over to the quote.

4. Define the applet user properties in the following table:

Item	Value
Name	Pane 2 Field xxx (where xxx can be any integer)
Value	Quote Id,DDID
Name	Pane 2 Item Drilldown Name
Value	Booking Drilldown

5. To configure the Function view drilldown, create a new drilldown object and set the values in the following table:

Item	Value
Name	Enter a name, for example, Booking Drilldown.
Hyperlink Field	Drill Down
Source Field	Drill Down
View	TNT SHM Function Line Item More Info View

Item	Value
Destination Field	ID

6. Define the applet user properties in the following table:

Item	Value
Name	Pane 2 Field xxx (where xxx can be any integer)
Value	Function Id,DDID
Name	Pane 2 Item Drilldown Name
Value	Booking Drilldown

7. For more information on configuring navigation in Siebel Tools, see *Using Siebel Tools* .

Configuring the Function Space Diary for Siebel Open UI Icons

The diary uses several types of icon graphics. Icons identify different types of bookings and function details. Button icons identify navigation buttons. Hierarchy icons depict the hierarchical relationships among the function spaces.

Siebel Hospitality provides a default set of icons for the diary. You can change the appearance of the diary icons by replacing the existing icon graphics with other graphics of your choice or design. For more information about customizing icons, see *Configuring Siebel Open UI* .

This task is a step in *Process of Configuring the Function Space Diary for Siebel Open UI*.

Icon Graphics and Files of the Function Space Diary

All icon graphic files are PNG files. The icons are listed in the following table. Pictures, descriptions, and the types of bookings or function details that they indicate are shown in *Icons in the Function Space Diary for Siebel Open UI*.

Icon	File Name	Pixel Sizes
24-hour hold	ind_24hr_hold	Standard
Backup required	ind_backup_req	Standard
Noise	ind_noise	Standard
Host booking	ind_host_booking	Standard

Icon	File Name	Pixel Sizes
Affiliate booking	ind_affiliates_booking	Standard
Related occurrence booking	ind_recurring	Standard
Do not move	ind_dont_move	Standard
Detail	Ind_detail_marker	Standard
Suite	suites	Standard
Holiday	ind_holiday	Standard
Special event	ind_special_events	Standard
Sell note	ind_sell_note	Standard
Function schedule	Ind_fnctn_schedule_marker	Standard
Subfunction	icon_subfunction	Standard

Process of Managing the Function Space Diary in Siebel Open UI

This topic lists the tasks that sales representatives, event managers, and revenue managers perform to manage the Function Space Diary. Your company might follow a different process according to its business requirements.

To view information in and manage bookings from the Function Space Diary, perform the following tasks:

- *Storing User Preferences for the Function Space Diary for Siebel Open UI*
- *Administering Function Space Diary in Siebel Open UI*
- *Navigating to the Function Space Diary in Open UI*
- *Navigating Within the Function Space Diary Time Scale in Siebel Open UI*
- *Navigating Within the Function Space Diary Time Range in Siebel Open UI*
- *Moving Objects in the Function Space Diary*
- *Changing Bookings in the Function Space Diary for Siebel Open UI*
- *Assigning Category Bookings to Specific Spaces*
- *Viewing Floor Plans in the Function Space Diary for Siebel Open UI*

- *Adding a Function in the Function Space Diary View for Siebel Open UI*
- *Copying a Function in the Function Space Diary View for Siebel Open UI*
- *Filtering Function Space Diary for Siebel Open UI Display Options*

Storing User Preferences for the Function Space Diary for Siebel Open UI

You can select and store your preferred default settings for information display controls in the Function Space Diary.

This task is a step in *Process of Managing the Function Space Diary in Siebel Open UI*.

To store user preferences for the Function Space Diary

1. Navigate to the User Preferences screen, Function Space Diary view.
2. In the Function Space Diary form, complete the fields to specify your default settings.

   Some fields are described in the following table.

Field	Comments
Default Timescale	Time intervals displayed in the diary views.
Display	Enables you to change the information that is displayed in the Booking Bar in the Diary.
Color By	Select a color scheme set up by the administrator in which to display bookings.
Daily Start Time	Time at which the diary display begins. Applies to the Time Scale settings by Day only, for example, Day/Hour, Day/Day-Part, Day/Half-Hour, and Day/Quarter-Hour.
Turn Times	Select to display the setup and tear-down times in the pattern set through CSS styling. Clear to show all bookings without turn-time indicators. However, warnings of turn-time conflicts are still displayed.
Config Space Pattern	Select to display booked, configured spaces in a diagonal pattern. **Note:** It is recommended that you use different patterns for Config Space Pattern and Turn Times because both fields might be selected at the same time.
Function Space Type Filter	Select the default option that you want to display in the Function Space Type field of the diary.
Drag/Drop Confirmation	Select to display a pop-up window when the move task is finished.

Field	Comments
Show Unreserved	Select to display Unreserved bookings in the Function Space diary.

3. Click Save.

Administering Function Space Diary in Siebel Open UI

You can use the Function Space Diary Administration view to set up your Function Space Diary.

This task is a step in *Process of Managing the Function Space Diary in Siebel Open UI*.

Note: The user preferences settings have precedence over the Function Space Diary Administration settings.

To administer Function Space Diary

1. Navigate to the Function Space Diary Administration screen, and then Function Space Diary Administration view.
2. In the Function Space Diary Administration form, complete the fields to specify your default settings.

   Some fields are described in the following table.

Field	Comments
Default Timescale	Time Scale Settings. Time intervals displayed in the diary views.
Daily Start Time	Time Scale Settings. Time at which the diary display begins. Applies to the Time Scale settings by Day only, for example, Day/Hour, Day/Day-Part, Day/Half-Hour, and Day/Quarter-Hour.
Display	Display Options. Enables you to change the information that is displayed in the Booking Bar in the Diary.
Color By	Display Options. Select a color scheme set up by the administrator in which to display bookings.
Function Space Type Filter	Display Options. Select the default option that you want to display in the Function Space Type field of the diary.
Turn Times	Display Options. Select to display the setup and tear-down times in the pattern configurable through CSS styling. Clear to show all bookings without turn-time indicators. However, warnings of turn-time conflicts are still displayed.

Field	Comments
Config Space Pattern	Display Options. Select to display booked, configured spaces in a diagonal pattern. **Note:** It is recommended that you use different patterns for Config Space Pattern and Turn Times because both fields might be selected at the same time.
Show Unreserved	Display Option. Shows Unreserved bookings in the Function Space Diary screen
Drag/Drop Confirmation	Advanced Settings. Controls when a validation pop up window should display when users select and (without releasing the selection) move a booking.
Weekend Color	Color setting for Weekend days

3. Click Menu and select Save Record.

Navigating to the Function Space Diary in Open UI

You can navigate to the Function Space Diary from multiple screens and views in the Hospitality application, which are listed in the following table.

To Navigate from This Screen and View...	Follow This Procedure
Functions screen, Functions List view	*Navigating to the Function Space Diary from the Functions Screen*
Quotes screen, Functions view	*Navigating to the Function Space Diary from the Quotes Screen*
Property screen, Total Availability view Property screen, Total Group Availability view Property screen, SR Type Availability view	*Navigating to the Function Space Diary from the Property Screen*
Property Pricing Admin screen, Out of Order view Property Pricing Admin screen, Unavailable view	*Navigating to the Function Space Diary from the Property Pricing Admin Screen*
Function Space Diary screen, Function Space Diary view	*Navigating to the Function Space Diary from the Function Space Diary Screen*

This task is a step in *Process of Managing the Function Space Diary in Siebel Open UI*.

Navigating to the Function Space Diary from the Functions Screen

To navigate to the Function Space Diary from the Functions screen, follow this procedure.

To navigate to the Function Space Diary from the Functions screen

1. Navigate to the Functions screen, then the Function List view.
2. In the Functions list, query for the function.
3. In the Function record, click the link in the Date field.
   The diary displays the property record associated with the function and the selected date.

Navigating to the Function Space Diary from the Quotes Screen

To navigate to the Function Space Diary from the Quotes screen, follow this procedure.

To navigate to the Function Space Diary from the Quotes screen

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Name field.
4. In the Function list, select the function, and then click the link in the Date field.
   The diary shows the property record and the selected date.

Navigating to the Function Space Diary from the Property Screen

To navigate to the Function Space Diary from the Property screen, follow this procedure.

To navigate to the Function Space Diary from the Property screen

1. Navigate to the Property screen.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the property Name field.
4. Perform one of the following actions:
   - Click the Total Availability view tab.
   - Click the Total Group Availability view tab.
   - Click the SR Type Availability view tab.
5. Click Go to Diary.
   The diary shows the property record and the current date.

Navigating to the Function Space Diary from the Property Pricing Admin Screen

To navigate to the Function Space Diary from the Property Pricing Admin screen, follow this procedure.

To navigate to the Function Space Diary from the Property Pricing Admin screen

1. Navigate to the Property Pricing Admin screen.
2. In the Properties list, query for the property record.
3. In the Property record, click the link in the Property Name field.
4. Perform one of the following actions:

- Click the Out of Order view tab, select the record, and then click the link in the Start Date Time field.
- Click the Unavailable view tab, select the record, and then click the link in the Recurr Start Date field.

The diary shows the property record and the selected date.

Navigating to the Function Space Diary from the Function Space Diary Screen

To navigate to the Function Space Diary from the Function Space Diary screen, follow this procedure.

To navigate to the Function Space Diary from the Function Space Diary screen

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab.

   For more information about the diary views, see *Function Space Diary Views in Siebel Open UI*.

About the Function Space Diary Time Scale Options in Siebel Open UI

The Time Scale Options in Siebel Open UI Function Space Diary are as follows:

- **Day/Day-Part.** Displays the diary views with the time axis for each day divided into the various day parts, such as morning, lunch, afternoon, and evening. Administrators set up the day parts in the Property Administration screen, Day Parts view. For more information about setting up day parts, see *Setting Up Property Day Parts*.
- **Day/Hour.** Displays the diary views with the time axis for each day divided into hourly intervals. The Day/Hour view displays 24 hours.
- **Month/Day.** Displays the diary views with the time axis divided into 30 days.
- **Month/Day-of-Week/Day Part.** Displays the diary views with the time axis showing the same day for five consecutive weeks, with each day divided into the various day parts, such as morning, lunch, afternoon, and evening.
- **Week/Day.** Displays the diary views with the time axis divided into seven consecutive days, starting with the day on which the specified start date falls.
- **Week/Day/Day Part.** Displays the diary views with the time axis divided into seven consecutive days, starting with the day on which the specified start date falls. Each day shows the various day parts, such as morning, lunch, afternoon, and evening.

Navigating Within the Function Space Diary Time Scale in Siebel Open UI

There are several ways that you can navigate in the Function Space Diary Time Scale.

- Drilling down on a date in the Week and Month Time Scale, takes you to the Day/Day-Part Time Scale. Drilling down on a date in the Day Time Scale, takes you to the Month (M/DW) Time Scale.
- You can click on a date in any time scale (except if they are already in the day time scale) to navigate to a day time scale for the date originally selected. For example, if you are in the month time scale and click the date of January 4th, it will change the time scale of the diary to the Day/Day Part time scale and go to the date of January 4th. The relative position within the diary vertically should not change. For example if you are in the middle of the diary vertically, then you will still be in the middle of the diary after the date changes.

- Drilling down on availability, takes you to the Total Availability view for that day. There is a third axis on the time scale that displays for each day, the Total Group Availability/Group Authorized or just Total Group Available if space is limited and both will not fit. You can drill down on the group available to go to the Total Group Availability view.

Navigating Within the Function Space Diary Time Range in Siebel Open UI

You can navigate within the Function Space Diary views to reach any required date and time period, moving in increments of one day or one week or back or forward.

This task is a step in *Process of Managing the Function Space Diary in Siebel Open UI*.

To navigate within the Function Space Diary time range

1. Navigate to the Function Space Diary screen.
2. Select a property and date for which you have a record.
3. Click the appropriate time scale button, for example, Week/Day.

   The Function Space Diary displays your selected date as the first date in the view.
4. Move backward and forward in the diary by using the arrow buttons.

   The arrow buttons are located adjacent to the date hyperlink. The buttons are described in the table that follows.

Timescale	Single Arrow	Double Arrow
Day	Next Day or Previous Day	Next Week or Previous Week
Week	Next Week or Previous Week	Next Month or Previous Month
Month	Next Month or Previous Month	Next Year or Previous Year
Month Day of Week	Next Day or Previous Day	Next Month or Previous Month (next or previous set of 5 weeks)

Moving Objects in the Function Space Diary

Based on your user preferences or your Function Space Administration settings, the Confirmation dialog will be displayed. You can perform many move operations in any view of the Function Space Diary. When you select and (without releasing the selection) move a booking or extend and shrink a booking in the diary, the booking falls onto the nearest 15 minute mark.

The descriptions in this topic illustrate typical move operations, as follows:

- *Moving a Booking to a Different Time or Function Space*
- *Converting Between Specific Space Bookings and Category Bookings*
- *Optioning and Overbooking a Specific Space*
- *Moving Space Hold Bookings*
- *Problems Moving Bookings with Backup Spaces to New Times*
- *Exchanging Specific Space Bookings*
- *Extending or shrinking Bookings*
- *Restrictions on Moving Bookings*

This task is a step in *Process of Managing the Function Space Diary in Siebel Open UI*.

Moving a Booking to a Different Time or Function Space

Users can select and (without releasing the selection) move a booking to a different time, select and (without releasing the selection) move a booking within the same time period to a different function space, or select and (without releasing the selection) move a booking to a new function space at a different time.

To move a booking to a different time or function space

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Compact Diary, or Total Availability.
4. In the selected view, click Date.
5. In the Date text box, enter the date, and click Enter.
6. The Time Scale set in User Preferences will be displayed in Diary views.
7. Select the booking that you want to move to a new location within the diary and, without releasing the selection, then move the booking to the new location (and release the selection).

   While moving the booking, you can scroll horizontally or vertically at the same time.
8. Drop the booking on the new location.

   The Add/Update dialog box appears.
9. In the Add/Update dialog box, complete the fields, as required.

   The Add/Update dialog box enables you to fine-tune and confirm the move operation. Some fields are described in the following table.

Field	Comments
Quote #	Function Information. Predefaulted with booking quote and cannot be changed.
Setup Style	Function Information. The setup style will be predefaulted with booking function's setup style. Setup styles that have been defined as universally available appear in the list. For more information about setup styles, see *Setting Up Function Spaces, Sleeping Rooms, and Suites* and *Defining Day Parts, Status Indicators, and Setup Style Translations*.

Field	Comments
Quote Name	Function Information.The name of the quote. The quote name will be predefaulted with booking quote and cannot be changed.
Function Name	Function Information.The name of the function. The function name will be predefaulted with booking function.
Function Status	Function Information. Predefaulted with the selected quote status.
Function Space	Function Information. The type of function space that is planned. The options include the function spaces configured for the current property. Predefaulted with the function space which the booking has been dropped.
Function Type	Function Information. The function type will be predefaulted with booking's function type. The options include the Function Type LOV values defined for the current property.
Inventory Status	Function Information. Predefaulted with the booking status and cannot be modified.
Function Date	Function Timing. The date of the function. By default, displays the date which the booking has been dropped and you can modify this date.
Start Time	Function Timing. Starting time of the function. By default, displays the beginning time on which the booking has been dropped. You can modify the new starting time of the booking by changing this time.
End Time	Function Timing. Ending time of the function. By default, displays the end time on which the booking has been dropped. You can modify the new ending time of the booking by changing this time.
Expected	Attendees. The expected number of attendees for the function, from the estimates provided by the customer. Expected will be predefaulted with booking's function expected quantity
Set	Attendees. The set number of attendees for the function, from the estimates provided by the customer. Set will be predefaulted with booking's function set quantity.
Guaranteed	Attendees. The Guaranteed number of attendees for the function, from the estimates provided by the customer. This field is prepopulated with the booking's function Guaranteed quantity.

10. Click OK to confirm the changes to the booking.

Converting Between Specific Space Bookings and Category Bookings

This topic describes how to convert a specific space booking into a category booking.

To convert a specific space booking into a category booking

- Select and (without releasing the selection) move the specific space booking to the category bar.

  The booking is temporarily assigned and shown against the specific space if possible. If the booking is not assigned, then it still appears under the category bar.

Temporarily assigned category bookings can be converted to specific space bookings by selecting and (without releasing the selection) moving the category bookings to the specific space. Category Overflow bookings that are moved to a specific space are automatically converted to specific space bookings.

Optioning and Overbooking a Specific Space

This topic describes how to option or overbook a specific space.

To option or overbook a specific space

- Select and (without releasing the selection) move a specific space booking to another booking, such as a specific space or a dependency

  The Add/Update Bookings dialog box appears. Verify the information displayed and click OK. If a Booking Conflict dialog box appears, notifying you that the selected a function space time that conflicts with an existing booking, then you can either click OK, Option, Overbook, or Cancel.

Optioning and Overbooking a Specific Category

This topic describes how to option or overbook a specific category.

To option or overbook a specific category

- Select and (without releasing the selection) move a booking to the category bar

  The Add/Update Bookings dialog box appears. Verify the information displayed and click OK. The booking is automatically reserved and assigned if possible. If the booking cannot be reserved, then a dialog box appears notifying you that a conflict exists.

  In both of these cases, you can change the booking to an option, overbook, or cancel the change by clicking the appropriate buttons (Overbook, Option, Cancel) in the dialog box. You can also click OK to acknowledge that the booking was unsuccessful and allow it to be unreserved.

Moving Space Hold Bookings

You can select and (without releasing the selection) move bookings within a detailed function or a space hold function. For example, Salon ABCD has been detailed, and it has a booking in Salon A. The booking in Salon A can be moved to a different salon within Salon ABCD or to a different time within the start and end times of the detailed function. You can also select and move existing bookings out of a space hold or into a space hold.

You can promote a subfunction to a function by selecting and moving it out of a space hold, which breaks the child-to-parent dependency of the subfunction. Conversely, you can select and move a function onto a detailed function to make it a subfunction of the detailed function.

Restrictions That Apply to Moving Space Hold Bookings

The following restrictions apply to selecting and (without releasing the selection) moving space hold bookings:

- Select and move works only for subfunctions. You cannot select and move a parent detailed function.
- The entire function must be within the time period of the space hold for it to be part of the space hold.
- If a function is moved into or out of a space hold, then the corresponding relationships (that is, parent and child) are reflected in the function lists. For example, if you select and move a subfunction out of a detailed function, the subfunction is no longer part of that detailed function. Consequently, in the Quote screen, Functions view, any subfunction you selected and moved in the diary is no longer displayed under the detailed function.
- A space hold function holds space for a specific quote. Therefore, you cannot select and move functions belonging to a different quote into a space hold. If you can successfully option or overbook the function space time for the active booking, then the backup space is also moved to the new time. All functions within a space hold must belong to the quote for which the space hold was created.

Problems Moving Bookings with Backup Spaces to New Times

When you move an active booking to a new time period, the backup space must also be able to move to the new time for the booking to be successful. When you successfully select and (without releasing the selection) move an active booking to an available time period, the backup booking moves with it. However, if the move is not successful, then one of the following might have occurred:

- **Active booking cannot be moved due to conflicts.** If the active booking cannot move to the new time period due to conflicts, then a dialog box appears allowing you to option, overbook, cancel, or unreserve the booking. If you click OK, then both the active and the backup bookings are unreserved.
- **Conflict with the backup booking.** If a conflict occurs when you try to move the backup booking, then you can try overbooking or optioning the backup space time in the dialog box that appears. However, if this attempt is unsuccessful, then you must unreserve the backup booking or cancel the change.

Exchanging Specific Space Bookings

This topic describes how to exchange specific space bookings.

To exchange specific space bookings

- To exchange specific space bookings, for example exchange Space A and Space B, select and (without releasing the selecction) move Space A onto Space B.

  Space A becomes either optioned or overbooked. You can then select and (without releasing the selection) move Space B to the place previously occupied by Space A.

Extending or shrinking Bookings

This topic describes how to extend or shrink a booking.

To extend or shrink a booking

1. Select and then move either end of the indicator bar of the booking to extend or shrink the booking into a later or an earlier time period as required.

2. Use the pop-up dialog box to check the precise time period to which you have extended or shrunk the booking.

Restrictions on Moving Bookings

You cannot perform the following operations with bookings:

- Select and (without releasing the selection) move a booking to a position that has no resource.
- Select and (without releasing the selection) move a booking to a specific space that does not accommodate the setup style of the booking.
- Select and (without releasing the selection) move a booking to an ineffective specific space or category.
- Select and (without releasing the selection) move a backup booking to a different time period.
- Select and (without releasing the selection) move a Function that has the Do Not Move Flag option selected.
- Select and (without releasing the selection) move a Function that has the Detail Flag option selected.

Changing Bookings in the Function Space Diary for Siebel Open UI

You can change bookings directly from the Function Space Diary by using the following procedures:

- *Assigning Category Bookings to Specific Spaces*
- *Changing or Editing a Booking Inventory Status*

This task is a step in *Process of Managing the Function Space Diary in Siebel Open UI*.

Assigning Category Bookings to Specific Spaces

If a revenue manager is satisfied with the specific space assignments that are displayed in the diary, then the manager can convert all category bookings for the day into specific space bookings. The function space inventory engine automatically accounts for new bookings as well as existing bookings and assigns the category bookings to the specific spaces.

To assign category bookings to specific spaces

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Compact Diary, or Total Availability.
4. Click the Menu button and select Assign to assign the category bookings to specific spaces.

Changing or Editing a Booking Inventory Status

Booking inventory records can be updated directly from within the diary views by double clicking the booking.

You can double click on a booking and see a pop up with editable fields and additional actions. The pop up should also provide buttons to invoke additional actions. Each of the buttons will only be shown when applicable. If the button cannot be used, it will not be shown.

To change a booking inventory status

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Compact Diary, or Total Availability.
4. In the selected view, enter the required start date and select the required time scale.
5. To make status changes, perform one or more of the operations described in the following table.

To Make This Status Change	Perform This Action	Result
Unreserve a reserved booking	Double-click the booking, and choose Unreserve.	Based on the Unreserved option under the Display Options section in the filter panel, the booking may be visible or not in diary and the inventory status changes to Unreserved.
Assign a specific space booking to a category	Double-click the booking, and choose Assign to Category.	The booking changes color to indicate that it is no longer assigned to a specific function space.
Assign a category booking to a specific space	Double-click the booking, and choose Assign to Specific Space.	The booking changes color to indicate that it is no longer assigned to a category.
Overbook an optioned booking	Double-click the booking, and choose Overbook.	The booking changes color to indicate that it is overbooked.
Option an overbooked booking	Double-click the booking, and choose Optioned.	The booking changes color to indicate that it is not overbooked.
Unreserve an optioned or overbooked booking	Double-click the booking, and choose Unreserve.	The booking inventory status changes to Unreserved and the split may be removed or not from the indicator bar, based on the Unreserved selection under the Display Options section in the filter panel.
Unreserve a reserved booking on the same indicator bar as an optioned booking	Double-click the booking, and choose Unreserve.	The optioned booking inventory status changes to Option Reserved and the split may be removed or not from the indicator bar, based on the Unreserved selection under the Display Options section in the filter panel.
Unreserve a reserved booking on the same indicator bar as an overbooked booking	Double-click a reserved booking on the same indicator bar as an overbooked booking, and choose Unreserve.	The overbooked booking inventory status changes to Reserved and the split may be removed or not from the indicator bar, based on the Unreserved selection under the Display Options section in the filter panel.

To Make This Status Change	Perform This Action	Result
Reserve an unreserved booking	Double-click a reserved booking	The inventory status changes to Reserved, if available. Otherwise, conflict dialog appears.
Unreserve any booking (other than unreserved status)	Double-click the booking, and choose Unreserve.	The inventory status changes to Unreserved and based on the Unreserved option under the Display Options section in the filter panel, the booking may be visible or not in diary.
Copy	Double-click the booking and choose Copy.	The Copy window displays.
Go To Function	Double-click the booking and select Go To Function.	Navigates to the function in Quotes Functions.
Add a Function	Double-click anywhere in the Function Space Diary.	The Add Function window displays.

To edit a booking

1. Navigate to the Function Space Diary screen.
2. In the Properties form, query for the property record.
3. Click the appropriate view tab from one of the following: Sales/Execution, Revenue Management, Compact Diary, or Total Availability.
4. Double-click on booking and complete some of the following fields as required.

Field	Comments
Quote Name	Function Information.The name of the quote. The quote name will be predefaulted with booking quote and cannot be changed.
Function Name	Function Information.The name of the function. The function name will be predefaulted with booking function.
Function Type	Function Information. The function type will be predefaulted with booking's function type. The options include the Function Type LOV values defined for the current property.
Setup Style	Function Information. The setup style will be predefaulted with booking function's setup style. Setup styles that have been defined as universally available appear in the list. For

Field	Comments
	more information about setup styles, see *Setting Up Function Spaces, Sleeping Rooms, and Suites* and *Defining Day Parts, Status Indicators, and Setup Style Translations*.
Function Status	Function Information. The function status will be predefaulted with booking's function status.
Function Space	Function Information. The function space will be predefaulted with booking's function space.
Function Date	Function Timing. The date of the function. The function date will be predefaulted with booking's function date.
Start Time	Function Timing. The start time of the function. The start time will be predefaulted with booking's function start time.
End Time	Function Timing. The end time of the function. The user can specify a start time and an end time and the duration is automatically calculated. The end time will be predefaulted with booking's function end time.
Expected	Attendees. The expected number of attendees for the function, from the estimates provided by the customer. Expected will be predefaulted with booking's function expected quantity
Set	Attendees. The set number of attendees for the function, from the estimates provided by the customer. Set will be predefaulted with booking's function set quantity.
Guaranteed	Attendees. The Guaranteed number of attendees for the function, from the estimates provided by the customer. This field is prepopulated with the booking's function Guaranteed quantity.

5. Click OK.

   If there is a conflict, you will receive a booking conflict error. You can select overbook, option or create an unreserved function

Viewing Floor Plans in the Function Space Diary for Siebel Open UI

This topic describes how to view floor plans in the Function Space Diary.

This task is a step in *Process of Managing the Function Space Diary in Siebel Open UI*.

To view floor plans in the Function Space Diary

1. Navigate to the Function Space Diary screen.
2. In the Property form, query for the property record.
3. To access the views of floor plans, perform the following actions:
   - **Floor plan.** In the Property form, click Floor Plan.

     An image appears depicting the function spaces of the selected property.

     The graphics file image is added as an attachment to the property record. The image can also be viewed on the Property screen by selecting the Floor Plans view tab. Users can choose whether to open the file from the current location or to save a copy on their own computer.
   - **Thumbnail floor plan.** Click the Property form Menu button, and choose Thumbnail Floor Plan.

     A thumbnail image appears representing the floor plan. You can select whether to open the file from the current location or to save a copy.
   - **Floor plan Web site.** Click the Property form Menu button, and choose Floor Plan Website.

     A Web site appears that shows property floor plans.

     > **Note:** The Floor Plan Website option must be configured by an administrator with Siebel Tools before it is available for use, as described in *Configuring the Floor Plan Website Option*.

Adding a Function in the Function Space Diary View for Siebel Open UI

The following procedures detail how to add functions in the Function Space Diary view.

To add a function in the Function Space Diary view

1. Navigate to the Function Space Diary screen.
2. Click the menu button, and then click Add Function.
3. Complete the fields as required. Some fields are described in the table that follows.

Field	Comments
Quote Name	Function Information.The name of the quote. Quote name will be predefaulted if drilling down from a quote, otherwise quote field will be null and user will need to select a quote.
Function Name	Function Information.The name of the function.
Function Type	Function Information. The type of function that is planned. The options include the Function Type LOV values defined for the current property.

Field	Comments
Setup Style	Function Information. The setup style for the function. Setup styles that have been defined as universally available appear in the list. For more information about setup styles, see *Setting Up Function Spaces, Sleeping Rooms, and Suites* and *Defining Day Parts, Status Indicators, and Setup Style Translations*.
Function Status	Function Information. Predefaulted with the selected quote status.
Function Space	Function Information. The type of function space that is planned. The options include the function spaces configured for the current property.
Function Date	Function Timing. The date of the function.
Start Time	Function Timing. The start time of the function.
End Time	Function Timing. The end time of the function. The user can specify a start time and an end time and the duration is automatically calculated.
Expected	Attendees. The expected number of attendees for the function, from the estimates provided by the customer.
Guaranteed	Attendees. The Guaranteed number of attendees for the function, from the estimates provided by the customer.
Set	Attendees. The set number of attendees for the function, from the estimates provided by the customer.

4. Click Add Function.

   If there is a conflict, then you receive a booking conflict error. You can select overbook, option or create an unreserved function.

Copying a Function in the Function Space Diary View for Siebel Open UI

The following procedures detail how to copy functions in the Function Space Diary view.

To copy a function in the Function Space Diary view

1. Navigate to the Function Space Diary screen.
2. Double-click on a booking, and select the Copy button from the pop-up window.
3. Complete the fields as required. Some fields are described in the table that follows.

Field	Comments
Quote Name	Function Information. The quote name will be predefaulted with booking quote and cannot be changed.
Function Name	Function Information. The name of the function.
Date	Function Timing. The date of the function.
Start Time	Function Timing. The start time of the function.
End Time	Function Timing. The end time of the function. The user can specify a start time and an end time and the duration is automatically calculated.
Subfunctions	Function Details. Specify whether sub-functions of the selected function, if any, must be copied or not.
Line Items	Function Details. Specify whether line items of the selected function (its sub-functions, if any) must be copied or not.
Backup Spaces	Function Details. Specify whether backup spaces of the selected function, if any, must be copied or not.
# of Days	Recurrence. User can copy a function for multiple days.

4. Click OK.

Filtering Function Space Diary for Siebel Open UI Display Options

The Function Space Diary filter panel is divided into two sections, Booking Display Options and Filters. You can use the filter panel to enter query parameters into either or both of the sections. Through the Function Space Diary filtering panel, you can create queries that are based on booking as well as function space attributes. The Function Space Diary filtering panel is available in each diary view. When you run a query in the Function Space Diary filter panel, the diary changes to display only the information determined by the query criteria.

You can also use the filter panel to change the way that information appears in the Function Space Diary.

This task is a step in *Process of Managing the Function Space Diary in Siebel Open UI*.

To filter Function Space Diary display options

1. Navigate to the Function Space Diary screen.
2. Click the Settings button to display filtering options.
3. In the Booking Display Options section, select your options. Some options are described in the following table.

Field	Comments
Turn Times	Displays the setup and tear-down times in the pattern configurable through CSS styling. Clear to show all bookings without turntime indicators. However, warnings of turn-time conflicts are still displayed.
Configured Space Pattern	Select to identify booked spaces that are configured spaces by a diagonal pattern.
Label	Select an option to show different information as labels on the booking indicator bars. When you change the display option, all bookings show the selected label. For example, if you select Setup Style, then all the bookings appear with the setup style information.
Display By	Select the basis for how booking colors are displayed. This selection helps you to see the differentiations between bookings. The color scheme options are as follows: o **Inventory Status.** Displays booking colors for inventory status values as defined in the Function Space Administration screen, Function Space Diary Administration view, Function Color Schema list. For more information, see *Defining Status Color Schemes for the Function Space Diary*. o **Function Status.** Displays booking colors for function status values as defined in the Function Space Administration screen, Function Space Diary Administration view, Function Status Color Schema form. o **Quote Status.** Displays booking colors for quote status values as defined in the Function Space Administration screen, Function Space Diary Administration view, Quote Status Color Schema form.
Inventory Status	Displays bookings filtered on the filter criteria defined through available options. Options include: o Reserved o Overbooked o Optioned/Option Reserved o Unreserved

4. Click Set to apply the settings or click Reset to reset the user preference settings.
5. In the Filters section, select your options. Some options are described in the following table.

Field	Comments
Function Space Type	Select one of the following options to display or hide function spaces with Special Location status: o **All.** Default. Displays all function spaces whether or not they have Special Location status. o **Specific Space.** Displays only those function spaces that do not have Special Location status. o **Special Location.** Displays only those function spaces that have Special Location status.
Area UOM	The unit of measure to use for the function space area (square feet or square meters).
Min Area	Filter function space based on Usable Area.
Max Area	Filter function space based on the usable area. Min Area and Max Area can also define any search range or individually as well.
Function Space Attributes	Options include: o Windows o Internet o Cable TV o Satellite

6. Click Filter to apply filters or click Clear to clear filters.
7. To expand or collapse data in the diary, click Menu and select either:
    - **Expand All.** Show data in the diary. Users can view the entire hierarchy of categories and the specific space of each category.
    - **Collapse All.** Hide data in the diary. Users can view overflow bookings, like category bookings that could not be temporarily assigned or options on categories and overbookings on categories, and then reassign the bookings. The overflow bookings can then be positioned against an unassigned category or specific space.

25 Applying Quote and Order Pricing

Applying Quote and Order Pricing

This chapter provides conceptual topics and examples that explain typical quote and order pricing processes. It includes the following topics:

- *About Quote and Order Pricing*
- *About Function Space Pricing*
- *About Sleeping Room Pricing*
- *About Suite Pricing*
- *About Quote Pricing for Meeting Packages*

About Quote and Order Pricing

Property pricing administrators are responsible for setting prices at each property for products and services that are sold to large groups requiring sleeping rooms, function space and catering products. Prices quoted to customers vary by property, product type, customer, date, day of week, day part, and other factors. A sales representative can apply these prices to sleeping rooms, function space, and other ancillary products (for example food, beverages, and audiovisual services) that are sold during an event. Siebel Hospitality employs a rules-based pricing system that applies prices to a quote according to pricing data that exists in the Siebel Hospitality database. After system-based recommendations appear in the quote, further negotiations with the customer result in a finalized quote (with price overrides). This finalized quote is then converted into an order.

Pricing management involves three primary pricing processes:

- Pricing data management and pricing administration. For more information, see *Setting Up Pricing and Property Pricing*.
- Quote and Order Pricing. This chapter cover the basics of quote and order pricing.
- Revenue management and profitability analysis. For more information, see *Managing Hospitality Revenue*.

About Function Space Pricing

Function space pricing is determined by the rental price for the function space and also the profit and revenue thresholds for the function space. These pricing factors are defined by the pricing administrator. This topic describes how function space prices are calculated, and contains the following topics:

- *Function Space Room Rentals*
- *Profit and Revenue Thresholds*
- *Function Line Item and Revenue Data Repricing*

Function Space Room Rentals

Function space room rentals are defined for the days of the week, and can change from season to season, as well as by parts of the day. When an administrator sets up function space room rates for a hospitality property, the administrator establishes default rentals for each day of the week as well as the exceptions for different seasons. For more information, see *Defining Function Space Pricing Rules*.

Users can use function space room rentals as benchmark rental prices for a quote or order, before pricing adjustments are made.

Profit and Revenue Thresholds

Thresholds are predetermined amounts that indicate how much profit must be made by the hospitality property to complete the booking. Some hospitality companies only accept function space business if a predetermined profit threshold amount is met for a property event. This mechanism is used to qualify event opportunities at a property according to the revenue and profit potential of the event.

The Revenue Manager can override the threshold and approve a quote even if it does not meet the threshold or has a negative threshold profit variance.

Thresholds are defined by revenue managers for function space by days and day parts. For more information, see *Administering Function Space Pricing*.

When thresholds are calculated, the following rules are applied:

- Any time a function touches a day part, even for a few minutes, the function space category threshold value for the day part is applicable.
- The functions for threshold calculation are considered along with established turntimes.

Example of a Threshold Calculation with Applied Rules

This example explains the threshold calculation that occurs when three functions take place in the same function space called FSC 1. The following table shows the functions and time intervals.

Function Name	Function Type	Start Time	End Time	Function Space
Function 1	Meeting	5:00 A.M.	11:59 A.M.	FSC 1
Function 2	Lunch	12:10 P.M.	1:00 P.M.	FSC 1
Function 3	Reception	3:00 P.M.	11:00 P.M.	FSC 1

To calculate the required threshold for each function, Siebel Hospitality determines the number of day parts the function covers. The day part is included even if the function only uses a few minutes of the day part.

Siebel Hospitality then determines the threshold associated with each of the day parts listed for the function. The following table shows how day parts are set up for the property.

Day Part Name	Start Time of Day Part	End Time of Day Part
Overnight	12:00 A.M.	6:00 A.M.
Morning	6:00 A.M.	9:00 A.M.
Afternoon	9:00 A.M.	12:00 P.M.
Lunch	12:00 P.M.	2:00 P.M.
Evening	2:00 P.M.	6:00 P.M.
Night	6:00 P.M.	12:00 P.M.

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

Day Part	Function Space	Threshold
Overnight	FSC 1, FSC 2	100
Morning	FSC 1, FSC 2	200
Afternoon	FSC 1, FSC 2	500
Lunch	FSC 1, FSC 2	300
Evening	FSC 1, FSC 2	800
Night	FSC 1, FSC 2	800

The following table shows how the required threshold calculation occurs, assuming the turntimes are zero.

Function Space	Function	Day Part Touched	Threshold for Function Day Part	Threshold Sum for Function
FSC 1	F1	Overnight, Morning, Afternoon	100 plus 200 plus 500	800
FSC 1	F2	Lunch	300	300
FSC 1	F3	Evening, Night	800 plus 800	1600

Function Space	Function	Day Part Touched	Threshold for Function Day Part	Threshold Sum for Function
Required Threshold	Not applicable	Not applicable	Not applicable	2700

As can be seen from the preceding table, the thresholds are calculated as follows:

- Threshold Sum for Function equals Sum of the Thresholds for Function Day Parts
- Required Threshold equals Sum of the Threshold Sum for Function

The following exceptions can be applied when the required threshold is calculated:

- If two functions (from the same quote) exist within the same day part for the same function space, then the day part is only counted once.
- If a customer requests that two functions be booked within the same day part for different specific spaces, then the threshold is counted for each separate room.
- If two functions belong to different categories, and both categories share the same component indivisible space as well as a day part, then only the threshold of the larger category is counted.

Function Line Item and Revenue Data Repricing

The user can recalculate the pricing for functions, roll up line item changes, and revise revenue data using the Reprice All and Refresh buttons. The Reprice, Reprice All, and Refresh buttons appear on the following views:

Reprice Button

The Reprice button is used to recalculate the price of individual functions or line items when new functions or line items are added or function space is changed. Multiple functions or line items can be selected and repriced at the same time. If Reprice is started from the Functions list applet in the Orders Functions view or Quotes Functions view, then all the line items in the selected function are repriced and then selected functions are refreshed.

If Reprice is started from the Function Line Items list applet, Siebel Hospitality retrieves the current price for the selected line item.

The Reprice button appears on the following views:

- Quotes screen, Functions view
- Orders screen, Function Line Items view
- Functions screen, Function List view

Users cannot use this button when dealing with nonparticipating properties (NPPs).

Reprice All Button

The Reprice All button is used to recalculate the price of all the functions in the function list. Reprice All is typically used when pricing is required for items that were previously flagged for pricing bypasses or if a new pricing scenario is being explored at the sales prospect stage. If the user starts Reprice All from the Orders Functions view or the Quotes Functions view, all of the line items are repriced at the same time.

When the user clicks Reprice All at the function level, the following actions occur:

- The room rental amounts are aggregated for all functions because room rental charges change depending on the day of the week.
- The required threshold is calculated.
- All catering products for the quote are repriced.
- Catering revenue and profit is calculated.
- The Profit threshold variance is calculated.
- Revenue threshold variance is calculated again.

When the user clicks Reprice All at the function line item level, Siebel Hospitality retrieves the current prices for all the line items in the current function.

The Reprice All button appears on the following views:

- Order screen, Function Line Items view
- Quotes screen, Functions view
- Functions screen, Function list view

Users cannot use this button when dealing with nonparticipating properties (NPPs).

Refresh Button

The Refresh button is used to roll up line item changes and recalculate revenue data that appears in the Quotes screen, Function Revenue Estimates view after changes are made to the line items. If there are no line item changes, no action occurs when the button is clicked.

When a change is made to a line item, the Need Refresh flag appears to remind users that the Refresh button must be clicked for revenue recalculation. Clicking Refresh in the Quotes screen, Functions view rolls up revenues from the line items to the function, and then to the quote. If the Line Item Sum flag is selected, then the sum of the line items is rolled up to the quote level; otherwise, the projected revenue values are rolled up to the quote level.

Clicking Refresh from the Quote Summary view rolls up revenue from sleeping rooms and functions to the quote level.

When a user clicks Refresh at the function level, the following actions occur:

- Catering revenue and profit is updated to reflect the updated revenue and profit of the selected functions.
- The Profit Threshold Variance is calculated.
- The Profit Variance is updated.
- The Required Threshold is recalculated.
- The Revenue Threshold Variance is recalculated.
- The average values are retrieved and aggregated in the Function Revenue Estimates.
- Quote Revenue Estimates are retrieved either from the average values or line items depending on the value in the Line Item Sum field.
    - If the flag in the Line Item Sum field is selected, then the revenue estimates are retrieved from the function line items.
    - If the flag in the Line Item Sum field is not selected, then the revenue estimates are retrieved from the average values of the functions.
- The opportunity revenue is updated with the projected quote revenue.

The Refresh button appears on the following views:

- Quote Functions view
- Quote Summary view

About Sleeping Room Pricing

Although a benchmark room rate is applied to sleeping rooms, the pricing can vary depending on the following factors:

- Room type
- Day of week (for example, on Sunday, increase by 5%; on Monday, increase by 15%)
- Seasonality (date ranges)
- Special Dates (overrides)

The benchmark rate for each room type is defined as an item in the pricing matrix of the property. There are seven benchmark prices for each room type, comprising an individual benchmark price for each day of the week. Additional pricing adjustments to benchmark prices are made using matrix-based pricing factors that detail pricing adjustments such as price overrides, price markup, discount amount, discount %, and % mark up. For more information about matrix pricing, see *Setting Up a Matrix Series*.

This topic contains the following topics:

- *Pricing and Room Occupancy*
- *Complimentary Room Pricing*
- *Scenarios for Weekday and Weekend Pricing*
- *Calculating Weighted Average Room Rates*
- *Pricing and the Negotiation Floor*
- *Minimum and Maximum Price*

Pricing and Room Occupancy

Any time a group sale occurs, the sales user captures occupancy information that is applied to the entire room block. This information includes:

- **Occupancy Percentage.** The percentage of rooms that are single, double, triple, and quads.
- **Occupancy Price Offsets.** The pricing offsets to be applied for each type of occupancy.

The following table shows the contracted value and price for a standard room on three different dates.

Room Type	Date	Contracted	Price
Standard	Jan. 5	100	100
Standard	Jan. 6	200	110
Standard	Jan. 7	300	120

Assume that the following information is entered in the Room Block Info record:

Occupancy %

The following information is entered for Occupancy %:

- Single % equals 50
- Double % equals 50

Occupancy Price Offset

The following information is entered for Occupancy Price Offset:

- Double Price Offset equals 20

The following actions occur during weighted average price calculations:

- The room price is retrieved for each room type in the Room Block Line Items list.
- The weighted average price is calculated for each room type.
- After the weighted average price is calculated, the price offsets are applied.

In this example, the weighted average price for the 50% single-room type occupancy is:

- (50 multiplied by 100 plus 100 multiplied by 110 plus 150 multiplied by 120) divided by (50 plus 100 plus 150) equals $113.33

The weighted average price for double rooms occupancy is:

- Weighted Average Price (Double Occupancy) equals Weighted Average Price (Single Occupancy) plus Price Offset for double.
- Weighted Average Price (Double Occupancy) equals $113.3 plus $20 equals $133.33

Complimentary Room Pricing

Sales representatives and sales managers can specify a number of complimentary sleeping rooms for an event. The complimentary number is not factored in when room availability is checked, but the number is relevant when the weighted average sleeping room rate is calculated. Complimentary rooms also are not factored into the calculation of total revenue that appears in the Quote Summary report.

For example, assume a quote has been generated for a group event, and the information appears in the Quotes screen, Room Blocks view. The specified occupancy for the group is single, and the property does not set different rates for weekends and weekdays.

The complimentary numbers of rooms are included in the contracted, projected and blocked numbers. As the following table shows, on July 5 there are 100 contracted rooms that include 10 complimentary rooms and 90 rooms that are not complimentary.

Room Type	Contracted	Projected	Blocked	Comp	Single Price	Date
STD	100	90	95	10	150	July 5

Room Type	Contracted	Projected	Blocked	Comp	Single Price	Date
STD	130	80	90	20	120	July 6

The total rooms that are contracted and complimentary for this event is taken into account when revenue is calculated, as the following table shows.

Date	Contracted	Complimentary	Revenue Calculation #	Single Price	Revenue
July 5	100	10	90	150	150 multiplied by 90 equals 13500
July 6	130	20	110	120	110 X120 equals 13200

Using these figures, the calculations for Total Revenue and Total Rooms Nights are:

- Total Revenue equals 13500 plus 13200 equals 26700
- Total Room Nights equals 100 plus 130 equals 230

The following table shows the Average Rate calculation, including Complimentary rooms.

Start Date	End Date	Total Room Nights	Total Revenue	Average Rate with Comp
July 5	July 6	230	26700	26700 divided by 230 equals 116

The following table shows the Average Rate calculation, excluding Complimentary rooms.

Start Date	End Date	Total Room Nights	Total Revenue	Average Rate
July 5	July 6	230	30600	30600 divided by 230 equals 133

The user can view both the Average Rate and the Average Rate with Complimentary Rooms by navigating to the Quotes screen, Room Blocks Negotiation Rates view.

Scenarios for Weekday and Weekend Pricing

Some properties employ business rules that require different rates for weekdays and weekends. This is because the guest profile on weekdays (often business travelers) can be different from the guest profile on weekends (often leisure travelers). In this case, each room block can have a weekday rate and a weekend rate. For properties that do not use different rates for weekdays and weekends, the average rate is always applied to each room type during an event.

This topic gives the following examples of how weekday and weekend pricing might be used. These scenarios illustrate the variances in room revenue for a property that uses different weekday and weekend pricing, and a property that uses the average rate for each day of the week. You might use weekday and weekend pricing differently, depending on your business model.

- *Applying Weekday and Weekend Pricing*
- *Applying Average-Rate Pricing*

Applying Weekday and Weekend Pricing

A three-day event is planned, with room blocks booked for Monday, Tuesday and Wednesday. Each property defines weekdays as Monday through Friday, and weekend days as Saturday and Sunday.

Property 1 uses weekday and weekend rates, while Property 2 uses the average rate for each day of the week. Property 2 does not have weekday and weekend rates.

As the following table shows, for Property 1 the total room price for the three days equals $10,000 ($2000 plus $6000 plus $2000). The average weekday rate is calculated as $10,000 divided by 40 total rooms equals $250. The average weekend rate is null, because the event did not continue into the weekend.

The total room price is the same for Property 2, which uses an average rate regardless of the day.

Property 1 and Property 2	Monday	Tuesday	Wednesday
Quoted # Standard Rooms	10	20	10
Price per Room	200	300	200
Total Room Price per Day	2000	6000	2000

Applying Average-Rate Pricing

An event lasts two days and requires room blocks for Tuesday and Saturday. In this case, there are weekday and weekend rate for Property 1. The following table shows Property 1 with the following rates:

- Average Weekday Rate equals $2000 divided by 10 equals $200
- Average Weekend Rate equals $3000 divided by 10 equals $300

Property 1	Tuesday (Weekday)	Saturday (Weekend)
Quoted # Standard Rooms	10	10
Price per Room	200	300
Total Room Price per Day	2000	3000

For Property 2, only one calculation is required to calculate the average rate for each room type as shown in the following calculation:

- Average Rate equals $5000 divided by 20 equals $250

In essence, weekend and weekday pricing for sleeping rooms is only weighted average pricing.

Calculating Weighted Average Room Rates

For quotes involving room rates that span multiple days, the weighted average room rate is returned in the Quote Room Block Negotiation Rates view.

To calculate the weighted average room rate, the adjusted benchmark room rates for each room type are retrieved and then summed. The total is then divided by the total room nights for each room type. The value returned to the quote is a weighted average of the various prices over multiple days.

For example, the Weighted Average Room Rate equals the sum of room revenue across multiple days for each room type divided by the sum of room nights for each room type.

Pricing and the Negotiation Floor

The *negotiation floor* defines the maximum discount that the sales representative or sales manager can give to the customer after all prices have been returned by the pricing engine. The Negotiation Rate and Weekend Negotiation Rate cannot be set to a value less than the Average Floor and Weekend Floor, respectively. If the sales representative or sales manager wants to give a discount which is less than the negotiation floor, then that user can submit a request to the revenue manager to approve the discount. For more information, see *Managing Hospitality Revenue*.

The following table shows an example of pricing for a property that does not have different rates for weekends and weekdays.

Date	Room Type	Contracted	Single Price	Day	Floor
Jan. 5	Standard	100	200	Sun	180
Jan. 6	Standard	30	150	Mon	135

The Floor value displayed in the table is calculated as Single Price minus Negotiation Floor. The Negotiation Floor value is set in the Property Pricing screen. In this case, the Single Price is 200.00 and the Negotiation Floor is 20.00. For more information about the Negotiation Floor value, see *Setting Up Rates for Sleeping Rooms*.

Given this example, the following table shows the values that appear in the Quote Room Blocks Negotiation Rates view.

Start Date	End Date	Average Rate	Average Floor	Negotiation Rate
Jan. 5	Jan. 6	188.46	169.62	188.46

The Average Rate is calculated as:

- (100 multiplied by 200 plus 150 multiplied by 30) divided by 130 equals $188.46

The Average Floor is calculated as:

- (100 multiplied by 180 plus 30 multiplied by 135) divided by 130 equals $169.62

On occasion, it is possible that the calculated average rate falls below the average floor. In that case, the Average Rate is set to the same as Average Floor. In the example given in the second table in this topic, if the real average rate from the calculation is less than 169.62 (for example, if it is at 165.50), it shows as 169.62.

Minimum and Maximum Price

The user can define the minimum and maximum price for each room type. If minimum and maximum prices are not defined, then the minimum and maximum prices are null as opposed to zero. Setting minimum and maximum prices makes sure pricing does not go beyond or fall short of the set prices after all pricing rules are applied.

About Suite Pricing

The sales representative has the option of booking a suite category as a room block line item and then booking a specific suite if he or she chooses to. In addition, after a specific suite has been booked, the customer can choose to schedule a function within the specific suite. The following example illustrates this situation.

In this case, a specific suite has been booked as a sleeping room and is priced as a sleeping room rather than a function space. The specific suite is booked as a sleeping room from 4 P.M. until 9 A.M. the next morning. If the customer decides to schedule a function from 5 to 6 P.M. within this specific suite, which the customer has paid for, the function is not charged an additional fee. In other words, the customer is not charged twice for using the same space for different purposes.

About Quote Pricing for Meeting Packages

This topic describes how Siebel Hospitality calculates pricing details for quotes that include meeting packages. This topic covers the following subjects:

- *About Mapping Adjustment Types to Line Item Fields*
- *About Mapping Rental Allocations to Function Space Line Items*
- *About Split Menus in Meeting Packages*
- *Scenario for Processing a Split Menu in a Quote Meeting Package*
- *Scenario for Processing a Set Menu in a Quote Meeting Package*
- *About Calculating Field Values for Quote Meeting Packages*

About Mapping Adjustment Types to Line Item Fields

The following table describes how pricing adjustments are mapped to the applicable line item fields according to the selection options for Adjustment Type field values in the meeting package administration records.

If Adjustment Type is equal to...	Then Value is mapped to this line item field...
Discount Amount	Discount Amount
% Discount	Discount %
Markup Amount	Discount Amount. Markups are displayed in parentheses, for example, ($10).
% Markup	Discount %. Markups are displayed with a minus sign, for example, -10%.
Price Override	Negotiated Price
Per Person Allocation	Negotiated Price. In this case, Negotiated Price is equal to Value multiplied by Expected.

About Mapping Rental Allocations to Function Space Line Items

Rental allocation is a per-person cost. Because multiple function spaces can be assigned to each function, only the primary function space receives the rental allocation. In the primary function space record, the Negotiated Price of the function space line item is calculated as Rental Allocation multiplied by Expected.

If the primary function space is changed to a different function space, the following actions occur.

Previous space. The previous primary function space line item field values are changed as follows:

- Negotiated Price is set to null.
- Core check box is cleared.
- Package is set to null.

New space. The new primary function space line item field values are changed as follows:

- Negotiated Price is equal to Rental Allocation multiplied by Expected.
- Core check box is selected.
- Package is set to the parent function meeting package.

About Split Menus in Meeting Packages

If a split menu is part of a meeting package, then the Quantity fields for the split line items are editable. Siebel Hospitality does not validate that the sum of the child line item quantities is equal to the quantity at the parent menu level.

In the meeting package administration record, the allocation for a split menu is defined at the parent menu level. For a split menu on a quote, each split item is assigned the parent menu allocation set in the meeting package administration record. The non-split child items do not receive revenue allocations. Revenue for a split menu is based on the main course that is selected for each attendee. Consequently, revenue categories for a split menu are based on the revenue categories that are set for the main course split items.

Scenario for Processing a Split Menu in a Quote Meeting Package

This topic gives one example of how a split menu is processed as part of a meeting package in a quote. You might use split menus in meeting packages differently, depending on your business model.

In the meeting package administration record, the allocation for a split menu equals 30.00. When this meeting package is added to a quote, the allocation value is set for each split item of the parent split menu. The line item allocation for a split item is mapped to Negotiated Price. The line item receives the value set at the parent menu level.

The following table shows how a split menu is represented on a quote with an associated meeting package, where the Expected value for this function is 20.

Parent Item – Child Item	Split	Split Price	Negotiated Price	Qty	Ext. Qty	Unit Net Price	Ext. Net Price	Rev. Estimate
Split Menu	NA	NA	NA	20	20	NA	NA	NA
– Chicken	Yes	10.00	30.00	10	10	30.00	300.00	300.00
– Steak	Yes	10.00	30.00	10	10	30.00	300.00	300.00
– Dessert	No	NA	NA	20	20	NA	NA	NA

A user enters the Qty values for the split items (Item 1 and Item 2). The Split Price field displays the value set for this product in the property administration record, rather than the meeting package allocation value. Siebel Hospitality ignores the Split Price values for split items that belong to a meeting package. The value in the Negotiated Price overrides these values. Revenue estimates for a split menu are calculated from the split line items of the parent split menu.

Scenario for Processing a Set Menu in a Quote Meeting Package

This topic gives one example of how a set menu that does not include split items is processed as part of a meeting package in a quote. You might use set menus in meeting packages differently, depending on your business model.

The administration record for the Menu Per Person is shown in the following table.

Parent Item – Child Item	Quantity	UOM	List Price
Menu	1	Per Person	50.00
– Chicken	1	Per Person	30.00
– Salad	1	Per Person	20.00
– Dessert	2	Per Person	15.00

When the menu is associated with a quote meeting package, the line item calculations for a Menu Per Person that does not include split items, with an Expected value of 10, are shown in the following table.

Parent Item – Child Item	Quantity	Extended Quantity	List Price	UOM	Unit Net Price	Extended Price
Menu	10	10	50.00	Per Person	50.00	500.00
– Chicken	1	10	30.00	Per Person	Not applicable	Not applicable
– Salad	1	10	20.00	Per Person	Not applicable	Not applicable
– Dessert	2	20	15.00	Per Person	Not applicable	Not applicable

For each child line item, Extended Quantity is calculated as Parent Quantity multiplied by Item Quantity, regardless of its Unit of Measure. The Parent Quantity value for menus in a meeting package is equal to the Expected value.

About Calculating Field Values for Quote Meeting Packages

This topic shows the calculations that Siebel Hospitality uses to derive field values in records for meeting packages and associated items.

- **Expected for functions.** The following table shows the formulas for calculating the Expected value for functions in a quote meeting package, according to the value options of the Applies To field.

Applies To	Calculation
DD	`Expected = Sum of DD for Day N`
CMP	`Expected = ((CMP[Single]) + (2*(CMP[Double])) + (3*(CMP[Triple])) + (4*(CMP[Quad])) for Day N`
DD/CMP	`Expected = (Sum of DD for Day N) + (CMP[Single]) + (2*(CMP[Double])) + (3*(CMP[Triple])) + (4*(CMP[Quad])) for Day N`

- **Quantity for function and nonfunction line items.** The following table shows the formulas for calculating the Quantity values for function line items and nonfunction line items in a quote meeting package, according to the value options of the Applies To and UoM fields.

Applies To	UoM	Calculation
DD	Per Person	`Qty = (Sum of DD for Day N) * (Qty in Mtg Pkg Admin)`
CMP	Per Person	`Qty = (CMP[Single] + (2*(CMP[Double])) + (3*(CMP[Triple])) + (4*(CMP[Quad])) for Day n) * (Qty in Mtg Pkg Admin)`
CMP	Per Room	`Qty = (Sum of sleeping rooms for Day N) * (Qty in Mtg Pkg Admin)`
DD/CMP	Per Person	`Qty = (Sum of DD for Day N + (CMP[Single])) + (2*(CMP[Double])) + (3*(CMP[Triple])) + (4*(CMP[Quad])) for Day n) * (Qty in Mtg Pkg Admin)`

- **Price Per Day for meeting packages.** The following table shows the formulas for calculating the Price Per Day values for a quote meeting package, according to the value options of the Attendee Type field. In other words, the table describes how the meeting package price per day is calculated for DD attendees, and for CMP attendees by sleeping room type and occupancy.

Attendee Type	Calculation
DD	`Package Price Per Day = (Sum of meeting package allocations for all line items that apply to DD)`
CMP	`Package Price Per Day = (Sum of "per day/Per person or each" meeting package allocations for all line items for a CMP * Occupancy) + (Sum of "per day/Per room" meeting package`

Attendee Type	Calculation
(by sleeping room type and occupancy)	allocations for all line items for a CMP) + ((Sum of "per stay/Per person or each" meeting package allocations for all line items for a CMP * Occupancy)/package duration) + (Sum of "per stay/Per room" meeting package allocations for all line items for a CMP/package duration) + (Single Price for the sleeping room type + applicable occupancy offset)

26 Managing Hospitality Revenue

Managing Hospitality Revenue

This chapter explains the revenue management evaluation process that occurs when a sales representative sends an opportunity quote to the revenue manager for evaluation. It includes the following topics:

- *About Managing Hospitality Revenue*
- *Scenario for Managing Hospitality Revenue*
- *Process of Managing Hospitality Revenue*
- *Completing the Revenue Evaluation Form*
- *Submitting a Quote for Revenue Evaluation*
- *Evaluating the Event Quote*
- *About Quote Evaluation Responses*
- *Viewing the Quote Evaluation Response*
- *Updating and Reducing the Negotiation Floor Rate*

About Managing Hospitality Revenue

The Revenue Management Evaluation process occurs after an opportunity is captured and property-specific quotes are generated. The sales representative continues to work with the customer to update the quote. During this process, the sales representative might have to modify quote information and submit the quote to a revenue manager who reviews and approves the changes. Typical conditions that can trigger the revenue management evaluation process include:

- The profit variance of a quote is negative.
- The sales representative wants to reduce the sleeping room rates to be less than the negotiation floor.
- The sales representative wants to overbook some functions.

Scenario for Managing Hospitality Revenue

This topic gives one example of how the Hospitality revenue functionality might be used. You might use the Hospitality revenue functionality differently, depending on your business model.

A customer is interested in a particular property for an event. However, the profit variance is negative for the property quote, and the sales representative must send it to the property revenue managers for review.

The sales representative completes the revenue management evaluation form, adds comments to the quote, and submits the quote to the revenue manager. The revenue manager at the property reviews the evaluation, the quote summary, and the comments, and approves the quote with some conditions.

Process of Managing Hospitality Revenue

The following table shows the procedures that the sales representative and the revenue manager typically perform to manage a revenue evaluation for a quote. Your company space and time follow a different process according to its business requirements.

To manage revenue evaluation for a quote, perform the following tasks:

If...	Then Perform These Tasks:
You are a sales representative	1. *Completing the Revenue Evaluation Form* 2. *Submitting a Quote for Revenue Evaluation*
You are a revenue manager	1. *Evaluating the Event Quote* 2. *Specifying and Assigning Evaluation Activities* 3. *Creating an Evaluation Response* 4. *Approving a Quote with a Negative Profit Variance* 5. *Viewing the Quote Evaluation Response* 6. *Updating and Reducing the Negotiation Floor Rate*

Completing the Revenue Evaluation Form

Using the Quote screen, Evaluation view, the sales representative documents the revenue information that the revenue manager considers when making the decision to approve or reject the quote for the event. The evaluation form typically provides the following information:

- Incremental revenue sources that result from the group or event. The sales representative can enter more than one incremental revenue source.
- Notes on potential future business that result from the event.
- Commission information. More than one commission can be entered.
- The date by which the evaluation must be completed so that the sales representative can respond to the customer.
- The sales manager's comments.

This task is a step in *Process of Managing Hospitality Revenue*.

To complete the revenue evaluation form

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote, and then click the link in the Name field.
3. Click the Evaluation view tab.
4. In the Evaluation form, set the value in the Evaluation Status field to Not Applicable, and then complete the fields.

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

Field	Comments
Evaluation Status	The status of the evaluation. Set the value in the Evaluation Status field to Not Applicable.
Evaluation Due Date	The date by which the evaluation is to be completed.
Commission	(Optional) The commission earned for this quote. You can add a number of different commission records for different services rendered during the quote phase. Using the single select button in the Commission records field, you can associate new and existing commission records with the evaluation. When creating new records, you can only enter either a commission amount or commission percentage.
By Pass	Select this check box to bypass the quote evaluation, and not complete an evaluation of the quote.
Value Rating	Provide a rating for the value of the quote.
Incremental Revenue Source	(Optional) Can be used to indicate if there is to be an incremental source of revenue arising from the quote. Using the single select button in the Increment Revenue Source field, you can associate new or existing revenue source records with the evaluation.
Historical Quote Name	(Optional) The name of a quote made previously. Historical quotes allow the revenue manager to reference the revenue brought in by a customer at other properties. Using the multiple select button in the Historical Quote Name field, you can associate other historical quotes with the evaluation.
Complexity Rating	A rating for how complex this quote was to create and develop.
Potential Future Business	The details (if available) on how future business with the customer could be developed.
Event Manager	The user ID of the event manager.
Sales Manager	The user ID of the sales manager.
Manager Comments	This is a multi-value field, so that iterations of the quote between the sales manager and the event manager can be tracked. Using the single select button in the Manager Comments field, you can enter manager comments.
Comments Summary	Any relevant evaluation comments about the quote if necessary.

Field	Comments

Submitting a Quote for Revenue Evaluation

A quote is automatically submitted to the designated revenue manager for review when the sales representative resets the value in the Status field of the evaluation form. The sales manager can access the evaluation in the Evaluation screen list. After the evaluation is submitted, the evaluation form and the quote cannot be modified by the sales representative.

The status of the quote evaluation changes as the revenue management evaluation progresses through various stages. The following table describes the status conditions during the revenue evaluation process.

Status	Description	Next Status
Not Applicable	The default state. This status indicates that the quote has not yet been submitted for evaluation.	Submitted
Submitted	This status is set by the sales representative to submit the quote to the revenue manager. This option is only available if the revenue evaluation for the quote goes through multiple iterations.	In Process
In Process	This status indicates that the revenue manager has started to review the quote.	Approved, Rejected
Approved	The revenue manager sets this status to indicate that the evaluated quote is approved.	Submitted
Rejected	The revenue manager sets this status to indicate the evaluated quote is not approved.	Submitted

This task is a step in *Process of Managing Hospitality Revenue*.

To submit a quote for revenue evaluation

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Name field.
4. Click the Evaluations view tab.
5. In the quote evaluation form, set the value in the Evaluation Status field to Submitted.

Evaluating the Event Quote

Revenue managers can access submitted quotes for evaluation from the Home Page, My Evaluations list or from the Evaluations screen, which includes all submitted quotes for evaluation. Rejected and Accepted evaluations do not automatically appear in the list.

The National Revenue Manager typically views evaluations across all organizations, while the property revenue manager typically views evaluations for a particular property. The My Cluster Evaluations screen allows revenue managers to look at all quotes that have been submitted for evaluation to a cluster revenue manager for all the properties within that cluster.

By clicking links in the evaluation list, the revenue manager can navigate to related screens and views to see relevant information about the function and the account, as described in the following table.

Field Link	Navigation Destination
Quote Name	Quotes screen, Functions view
Account	Accounts screen, More Info view
Evaluation Status	Evaluation screen, Evaluation Response view

Note: Before the revenue manager can begin reviewing the evaluation information, the evaluation status is set to In Progress.

This task is a step in *Process of Managing Hospitality Revenue*.

To evaluate an event quote

1. Navigate to the Evaluations screen, then the Evaluation list view.
2. In the Evaluation list, query for the evaluation record.

   The National Revenue Manager can filter evaluations by choosing All Evaluations Across Organizations from the visibility list.
3. In the Evaluation record, change the value in the Evaluation Status field to In Progress, and review the evaluation information.
4. Scroll down to the Quote Summary form, and review the Function Space, Sleeping Rooms, and other general information.
5. In the Evaluation record, click the link in the Evaluation Status field.
6. From the Evaluation Response view, click the Evaluation Summary view tab to review the submitted evaluation information and sales manager comments.

About Quote Evaluation Responses

As part of the quote evaluation process, the revenue manager can create and assign quote evaluation activities to other individuals. The manager can monitor the status of these activities from the Quotes screen, Activities view to see whether or not the activities have been carried out and what the completion of these activities means to the quote. At the conclusion of the evaluation, the revenue manager decides whether or not to approve the event quote. If the quote is rejected, the revenue manager can provide response details in the response record.

Responding to a Quote Evaluation includes the following tasks:

- *Specifying and Assigning Evaluation Activities*
- *Creating an Evaluation Response*
- *Approving a Quote with a Negative Profit Variance*

This task is a step in *Process of Managing Hospitality Revenue*.

Specifying and Assigning Evaluation Activities

The revenue manager can specify prioritized evaluation activities with due dates and assign the activities to sales team members associated with the property.

This task is a step in *Process of Managing Hospitality Revenue*.

To specify and assign evaluation activities

1. Navigate to the Evaluations screen, then the Evaluation List view.
2. In the Evaluation list, select the quote evaluation, and click the link in the Evaluation Status field.
3. In the Evaluation Response list, select the response record, and scroll down to the Activities list.
4. In the Activities list, create a new record, and complete the fields.
    - By default, the Due date, Planned Start, and Last Updated fields display the current date.
    - The Activity Type, Status, Assigned To, and Created By fields are also automatically populated.
5. In the Assigned To field, select the individual to whom the activity is assigned.
6. (Optional) In the Last Name field, select the contact person.

Creating an Evaluation Response

When the revenue manager responds to the sales representative, the Evaluation Status field is updated with either Rejected or Approved. After responding, the revenue manager creates an evaluation response record to communicate additional details about the response.

Perform the steps in the following procedure to create a quote evaluation response for the sales representative.

This task is a step in *Process of Managing Hospitality Revenue*.

To create an evaluation response

1. Navigate to the Evaluations screen, then the Evaluation List view.

2. In the Evaluation list, query for the evaluation record.
3. In the Evaluation record, click the link in the Evaluation Status field.
4. In the Evaluation Response list, add a record, and complete the fields.

   The following table describes some of the fields.

Field	Comments
Suggested Alternates	Suggested alternatives to the quoted items.
Response	This field is used by the revenue manager to summarize the response.
Required Release Date	The required date by which the status of the booking must be Definite or Released.
Required Cut Off Date	The date by which quoted items must be picked up or made available to others.
Room Attrition	Fee charged to the customer if the room block pickup is less than a certain number. The fee is typically based on a scale.
Contract Approval Required	This check box indicates whether the contract for the event must be formally approved.
Date	Automatically populated with the current date.
Contract Clauses	Specific clauses or conditions that must be included in the contract.
Catering Attrition	Fee charged to the customer if the catering revenue or attendance for the functions falls below a certain value. The fee is typically based on a scale.

Approving a Quote with a Negative Profit Variance

In some instances, when the sales representative generates a quote, the quote profit variance is negative, and the quote is typically sent to the revenue manager for approval.

The sales user cannot change the status of the quote from Prospect to Hold without getting the revenue manager's approval. When approval is received, the sales user can change the quote status to Hold or higher, such as T1, T2 or Definite.

This topic is a step in *Process of Managing Hospitality Revenue*.

Viewing the Quote Evaluation Response

After the revenue manager creates an evaluation response, the sales representative can view the details of the manager's response using the Quote Evaluation Response view. This is a read-only view, and the sales representative cannot change the evaluation response. The ability to view the evaluation response can be useful to the sales representative when the evaluation has been rejected, and the sales representative must take further action before the evaluation is accepted.

This topic is a step in *Process of Managing Hospitality Revenue*.

To view the quote evaluation response

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote, and then click the link in the Name field.
3. Click the Evaluations view tab, and then click the Quote Evaluation Response link.
4. Review the appropriate response in the list, as well as an activity associated with the response.

   For more information about the fields in the Quote Evaluation Response list, see *Creating an Evaluation Response*.

Updating and Reducing the Negotiation Floor Rate

In some cases, the sales representative submits a quote evaluation to the revenue manager to request an override of the established negotiation floor rate. This situation typically occurs when the customer is bringing in a great deal of function space revenue and asks for a discount on sleeping rooms.

The sales representative first attempts to update the standard negotiation rate for the sleeping rooms. If the new rate is less than the established negotiation floor rate, the sales representative is prevented from completing the rate update. The revenue manager can, however, reduce the negotiation floor for the quote.

Revenue managers space and time decide that a profit and revenue advantage exists if the customer is given a rate that is lower than the established negotiation floor for a particular booking or event. By modifying the established negotiation floor rate, the revenue manager can set a new negotiation floor that is not constrained by the established price.

For example, a customer plans to spend a lot of money on catering products for his event and wants a discount on sleeping rooms. The benchmark rate for a sleeping room at a property is $100 and the negotiation floor is set at $100. The sales representative wants to offer the customer a sleeping room rate of $90 dollars as an incentive for future business. The sales representative makes the recommendation in the comments field of the quote, and sends the quote to the revenue manager for evaluation.

After reviewing the quote, if the revenue manager agrees that the $90 rate is justified, the revenue manager changes the negotiation floor rate to $90.

Updating the Negotiation Rate (Sales Representative)

Perform the following procedure to update the negotiation rate for a room block. This procedure assumes that the room block records have already been created for the quote.

This task is a step in *Process of Managing Hospitality Revenue*.

To update the negotiation rate

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. From the Room Blocks form, scroll down and click the Negotiation Rates view tab.
5. In the Negotiation Rates list, click Calculate Rates.

   A new record appears in the Negotiation Rates list.
6. In the new record, update the value in the Negotiation Rate field.

   If the proposed negotiation rate is lower than the negotiation floor rate, an error message appears when the user attempts to save the Negotiation Rate record.

Modifying the Negotiation Floor Rate (Revenue Manager)

When the quoted negotiation rate for a room block is lower than the established negotiation floor rate at a property, the revenue manager must modify the existing negotiation floor rate so that the sales representative can successfully apply a discounted rate.

To modify the negotiation floor rate

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote # field.
4. From the Room Blocks form, scroll down and click the Negotiation Rates - Manager view tab.
5. In the Negotiation Rates - Manager list, modify values in the Avg Floor and Weekend Floor fields.

After the revenue manager has modified the negotiation floor rates, the sales representative can set the negotiation rate for the room block to a value greater than or equal to the updated Avg Floor or the Weekend Floor rates.

27 Finalizing a Quote, Managing Turnover, and Confirming Event Details

Finalizing a Quote, Managing Turnover, and Confirming Event Details

This chapter describes the procedures that users, such as event managers, sales managers and sales representatives would use to finalize a quote, complete the turnover to event management, and confirm post-quote details with the customer. It includes the following topics:

- *Scenario for Finalizing a Quote, Managing Turnover, and Confirming Event Details*
- *Roadmap for Finalizing a Quote and Managing Turnover*
- *Generating an Agreement from the Quote*
- *Setting an Event Quote Status to Definite*
- *Completing and Submitting the Turnover Checklist*
- *Reviewing the Turnover Checklist*
- *Process of Gathering and Confirming Event Details*

Scenario for Finalizing a Quote, Managing Turnover, and Confirming Event Details

This topic gives one example of how the functionality for finalizing a quote, managing turnover, and confirming event details might be used. You might use the functionality for finalizing a quote, managing turnover, and confirming event details differently, depending on your business model.

A customer reviews multiple property quotes with a sales representative, and decides that one quote is acceptable. The sales representative generates an agreement for the quote and sends the agreement to the customer for final approval.

The customer signs the agreement and returns it to the sales representative, who changes the status of the quote to Definite. All other quotes associated with the opportunity are automatically marked as *turndown* when the status of a selected quote is set to Definite.

The sales representative completes the Turnover checklist, changes the status of the quote to Submitted, and submits the Turnover checklist to the events director. As a result, the Turnover checklist is automatically sent to the events director, and the turned-over quote appears on the director's home page.

The events director accepts the turnover and then chooses the events team, designating one team member as the event manager. The event manager discusses and confirms details with the customer, and begins some event preparations before starting the ordering process.

Roadmap for Finalizing a Quote and Managing Turnover

The following list shows tasks and processes typically performed by the sales representative and event director when finalizing the quote and managing turnover tasks for a hospitality event. These tasks and processes are performed after a final quote is selected.

To finalize a quote and complete the turnover, perform the following tasks and processes:

1. *Generating an Agreement from the Quote*
2. *Setting an Event Quote Status to Definite*
3. *Completing and Submitting the Turnover Checklist*
4. *Reviewing the Turnover Checklist*
5. *Process of Gathering and Confirming Event Details*

Generating an Agreement from the Quote

After a customer agrees on a quote, the sales representative generates a formal agreement that must be signed and returned by the customer. If the customer makes changes to the agreement, the sales representative must generate a new agreement that incorporates the changes and return it to the customer for signature.

Note: A draft of documents can only be created if the Proposal Generator is correctly configured. For more information about the Proposal Generator, see *Siebel Applications Administration Guide* .

This task is a step in *Roadmap for Finalizing a Quote and Managing Turnover*.

To generate an agreement from a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Name field.
4. Click the Agreements view tab.
5. In the Agreements list, click AutoContract.

   The following table describes the fields in the record.

Field	Comments
Agreement #	The identification number for the agreement, which is automatically generated.
Name	The name of the agreement. The name is automatically populated with a system-generated value, and can be changed.

Field	Comments
Type	The type of agreement. The default value is Contract.
Status	The status of the agreement. The default value is In Progress.
Account	The account associated with the opportunity and quote.
Last Name	The last name of the primary contact.
First Name	The first name of the primary contact, which is automatically populated from the person selected in the Last Name field.
Valid	This field indicates whether the agreement is valid and is automatically populated when all the required information about the agreement has been entered.

6. In the Agreements list, click the link in the contract Name field to navigate to the Agreements Documents view.
7. From the Agreement form, click the Documents view tab.
8. In the Documents list, click AutoDocument.
9. Click Generate Draft to generate a draft of the document.

Setting an Event Quote Status to Definite

When the signed agreement is received from the customer, the sales representative sets the quote status to Definite.

Before setting the quote status to Definite, the user must verify that the quote does not have unreserved function spaces or room blocks. The user must make sure that functions or room blocks that do not have a status of Cancel or Lost/Turndown have an inventory status of Reserved, Optioned, or Overbook.

Setting the status of a quote to Definite affects the statuses of other quotes of the same opportunity in one of the following ways:

- If the TNT SHM Disable Accept Quote field of a Quote business component is set to N (the default), the statuses of other quotes associated with the opportunity are automatically updated to Lost/Turndown, and the following inventory is released:
  - Function space
  - Sleeping room
  - Suite
  - Asset
- If the TNT SHM Disable Accept Quote field of a Quote business component is set to Y, the statuses of other quotes associated with the opportunity remain the same as before. Siebel Hospitality will allow a user to change the statuses of other quotes generated from the same opportunity to Definite as well.

For more information about completing the TNT SHM Disable Accept Quote field, see *Configuring Multiple Quotes to Go Definite*.

If an event manager changes a nonparticipating property to Lost/Turndown after a quote has been made Definite, the inventory associated with the nonparticipating property is not released. A sales representative must manually release this inventory by changing the status of each line item to Unreserved.

Setting the status of a quote to Definite affects the opportunity revenue in one of the following ways:

- If the TNT SHM Update Opty Rev - Disable user property is set to N (the default), the revenue of the associated opportunity is updated to the revenue of the quote that went Definite.
- If the Update TNT SHM Opty Rev - Disable user property is set to Y, the revenue of the associated opportunity is not updated.

For more information about setting the TNT SHM Update Opty Rev - Disable user property, see *Disabling Opportunity Revenue Updates*.

This task is a step in *Roadmap for Finalizing a Quote and Managing Turnover*.

To set the event quote status to Definite

1. Navigate to the Quotes screen.
2. In the Quote form, query for the quote.
3. In the Quote form, change the value in the Status field to Definite and save the record.

When a quote status is set to Definite, Siebel Hospitality generates a backup of the quote. The backup quote status is set to Backup. When a user queries for a quote, two quotes appear, one with a status of Definite, and another with the status of Backup. The backup quote is a read-only snapshot of the definite quote, and cannot be modified.

Completing and Submitting the Turnover Checklist

The sales representative initiates the turnover process after the quote status is set to Definite.

This process begins with the *Turnover Checklist*, a predefined assessment template with related questions (attributes) that is set up by the administrator to make sure that conditions are met before the event is turned over to the event execution team. For more information on setting up assessment templates with attributes, see *Siebel Applications Administration Guide* . The sales representative completes the Turnover Checklist and submits it for approval.

The Turnover Checklist can be submitted for approval any number of times. Each time the Turnover Checklist is revised and resubmitted, the iteration is tracked in the turnover record.

This task is a step in *Roadmap for Finalizing a Quote and Managing Turnover*.

To complete the Turnover Checklist

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote.
3. In the Quote record, click the link in the Quote Name field.
4. From the Quote form, click the Turnover view tab.
5. In the Turnover list, add a record, and then click the single select button in the template field to choose a predefined template.

6. Complete the remaining fields, and save the record.
   The following table describes some of the fields.

Field	Comments
Active	Indicates the active turnover record for the quote. When a new record is created, the Active flag is set. However, if the user creates a second turnover record, the user must manually set it to active.
Template	The predefined turnover assessment template.
Iteration Name	A unique identifier for the iteration which is automatically populated.
Description	Automatically populated from the description associated with the assessment template selected in the Template field.
Status	The turnover status. For example, submitted, accepted, and rejected.
Turnover Date	The date the quote is turned over to event management. This value is a read-only, system-generated date and time.
Turnover To	An employee at the property. The selected employee is automatically added to the team.
Assessment Score	The actual score gained in the overall assessment of the event to see whether or not the event was successful. This score is calculated from the values specified in the turnover questions.
Assessment %	The percentage score gained in the overall assessment of the event to see whether or not the event was successful. This score is calculated from the values specified in the turnover questions.

   When the record is saved, the checklist questions appear in the Turnover Questions subview.
7. Scroll to the Turnover Questions view, complete each question by updating the Values field, and save the records.

   Note: A score is automatically calculated from the values selected for the questions.

To submit the Turnover to Events Management

1. In the Turnover list, select the Turnover record.
2. In the record, change the values in the following fields:

a. In the Turnover To field, select the person who is reviewing the Turnover Checklist.

   If no value is entered in this field, the submitted turnover record appears in the list on the Turnover Evaluation screen.

b. In the Status field, change the value to Submitted.

Reviewing the Turnover Checklist

When the Turnover Checklist is submitted to the event manager, the turnover record becomes read-only, and the Turnover Date field is populated with the current date. The active turnover record appears on the home page of the designated event manager or team member, and it also appears in the Turnover Evaluations screen list.

After reviewing the turnover, the event manager can either reassign the Turnover Checklist or accept or reject it. The event manager reassigns the Turnover Checklist by updating the Turnover To field.

There are three levels of visibility for turnover evaluations as follows:

- **My Turnover Evaluations.** This list shows all evaluations turned over to a specific person on a team.
- **My Cluster Turnover Evaluations.** This list shows all turnover evaluations for a cluster of properties.
- **All Turnover Evaluations.** This list shows all turnover evaluations for a particular property.

This task is a step in *Roadmap for Finalizing a Quote and Managing Turnover*.

To review the Turnover Checklist

1. Navigate to the Turnover Evaluations screen, then the Turnover List view.
2. In the Turnover List, query for the Turnover Checklist.
3. Review the checklist, update the status to In Process, and then change the status to either Approved or Rejected.
4. If the turnover is rejected, complete the Reason Turnover Declined field to provide the reason for rejecting the turnover.

   When the turnover is Approved or Rejected by the event manager, the Accepted By and Accepted Date fields are automatically populated.

   If the turnover is accepted, the event manager owns the event. If the Quote Turnover is rejected, the turnover record is returned to the sales representative for revision and resubmission.

Reviewing Quotes on the Turnover Evaluations Calendar

The Turnover Evaluations Calendar displays the quotes that have been assigned to an event manager or to an event manager's team. The quotes are displayed in the calendar according to their arrival dates. This is useful for an event manager who must accept turnover evaluations. If the arrival date of a quote is approaching, then the event manager can use the Turnover Evaluations list next to the calendar to accept or reject the evaluation.

Note: In order for an event manager to view quotes in this view, the Event Manager field for the quote must be populated with that event manager's name.

To review quotes on the Turnover Evaluations Calendar

1. Navigate to the Turnover Evaluations screen, then the Calendar view.
2. Examine quotes with an upcoming arrival date.
3. In the turnover evaluations list beside the calendar, query for turnover evaluations associated with the relevant quotes.
4. Accept or reject the turnover evaluations as appropriate.

Process of Gathering and Confirming Event Details

After the turnover process, the event manager verifies event details with the customer and updates event information if necessary, using the Quote screen's views.

This topic is a step in *Roadmap for Finalizing a Quote and Managing Turnover* and includes the following topics:

- *Confirming Sleeping Room Details*
- *Confirming Function Space Details*
- *Gathering and Confirming Function Details*
- *Gathering and Confirming Additional Requirements*
- *Managing Event Changes*

Confirming Sleeping Room Details

The event manager, using the Room Block and Room Block Line Item view, confirms and updates occupancy information, the method of reservation, the billing method, and suites information.

From the Room Block Line Items view, the event manager can perform the following tasks:

- Reserve Room Blocks
- OverBook Room Blocks
- Cancel Room Blocks
- Copy Room Blocks

For more information, see *Managing Property-Specific Event Quotes*.

Confirming Function Space Details

Using the Quote screen, Functions view and Function Line Items view, the event manager performs the following tasks:

- Assigns the function space category bookings to the specific space using the Function space diary.
- Creates and confirms 24-hour hold functions. The event manager can create 24-hour hold functions to hold the rooms in the intervening periods between two functions booked by the same party.
- Adds additional detail to the planned functions, and confirms the function space information such as agenda, timing, and setup style.

From the Functions Line Items view, the event manager can perform the following tasks:

- Reserve
- Next Fit
- Option
- Reprice
- Reprice All
- AutoBook
- Double Book/Rerent
- The event manager can shift the times of the functions, using the Timeshift button.

For more information, see *Managing Property-Specific Event Quotes*

Gathering and Confirming Function Details

The event manager begins finalizing equipment and asset requirements, contacts specialists and experts for complex events, and arranges for sample tastings of proposed banquet fare.

- **Equipment.** If the event requires equipment such as audiovisual products, the event manager adds equipment and other complex products using the Quote Functions Line Items view. The Product Administration screen can be used to refine the equipment to the requirements of the customer.
- **Destination Management Information.** The event manager adds destination management details in the Quote Notes view.
- **Menu.** The event manager begins to design a complex menu using the Quote Function Line Item view (or the Function screen, Line Item view). The menu is added as a line item. For more information about designing a menu for an event, see *Creating a Custom Menu or Package for a Function*.
- **Decoration and Presentation.** In the Function screen, Notes view, the manager enters details on items such as linen color and proposed settings.
- **Catering.** Event managers add catering products such as cutlery, tables, chairs, and so on, which must be reserved. In the Quote Function Line Items view, the manager uses AutoBook to reserve the items and Double Book if necessary.
- **Taste Panel.** For complex events, the event manager arranges for the customer to participate in a taste panel, and adds the proposed date information in the Quote Notes view. The manager creates activities for a proposed setup featuring menu items, which can be sampled by the customer, and assigns the activities to individuals on the banquet staff. These activities can be added in the Quotes screen, Activities view.

Gathering and Confirming Additional Requirements

The event manager also verifies the following additional requirements for the upcoming event are met:

- **Billing Information.** Using the Quote screen, Billing view, the event manager compares Bill To Account and Bill to Contact information, verifies that Group master or House accounts are set up, and also confirms that the credit approval process is completed.
- **Parking and Transportation.** In the Quote screen, Notes view, the event manager adds any special requests for parking and transportation and notes any obvious patterns in arrival and departure times. This information

helps management estimate requirements for front desk staffing and also underscores potential parking and transportation issues. The Notes view can also be used to detail V.I.P. arrangements.

- **Special Requests.** Using the Quote screen, Room Block Line Items view, the event manager records special requests for V.I.P. and staff sleeping rooms in the Room Notes field.

Managing Event Changes

During the process of confirmation of event details, the customer might decide to make significant changes to the quoted event, such as date changes and cancellations. After gathering the new requirements, the event manager might consult with the sales team to determine a course of action.

These actions might include:

- Discussions with revenue managers, and resubmission of the Quote Evaluation. For more information on the evaluation process, see *Managing Hospitality Revenue*.
- Creating a quote activity for the sales representative to determine if the event can be rebooked.

28 Generating and Managing Event Orders

Generating and Managing Event Orders

This chapter describes the tasks that sales representatives, event managers, and sales managers must perform to generate an order for an event, which is a key process in event finalization activities. It includes the following topics:

- *About Event Orders*
- *Scenario for Generating and Managing Event Orders*
- *Process of Generating and Managing Event Orders*
- *Generating Primary Event Orders*
- *Creating Function Orders*
- *Changing an Event Order Associated with a Function*
- *Associating Event Orders with a Function Line Item*
- *Creating Functions on the Orders Screen*
- *Managing Meeting Package Orders*
- *Creating a Hierarchy of Order Functions*
- *Viewing Line Items for an Event Order*
- *Adding Notes to an Event Order*
- *Adding Attachments to an Event Order*
- *Viewing the Total Discount for an Order*
- *Viewing Orders Associated with a Quote*
- *Viewing Event Checks Associated with an Order*
- *Viewing Event Order Specifications for Orders*
- *Viewing the Audit Trail for an Order Line Item*

About Event Orders

When a customer accepts a quote for an event, a Siebel Hospitality user can generate an order for that event from the chosen quote. This topic describes event orders. This topic covers the following subjects:

- *About Generating Event Orders*
- *About Order Visibility*
- *About Synchronizing Orders and Quotes*
- *About Orders with Meeting Package Components*

About Generating Event Orders

When a quote includes all the necessary details, the event manager or sales manager generates an order for that quote. This order contains details of all functions and function line items associated with the quote.

If there are a number of functions associated with a quote, the event manager can add as many details as necessary about a function, and then generate a single order for this function instead of generating a primary order for the entire quote. Thus, a number of orders can be generated for any one quote.

Even though a separate order is usually created for each function associated with a quote, it is possible to generate a single order for all functions in the quote. This capability gives event managers the flexibility to generate orders as they see fit.

When an order is generated from a quote, all functions associated with the quote, line items associated with the functions, and all pricing information are copied to the order. Similarly, when an order is generated from a function, line items and related pricing information are copied to the order.

Different order types exist for different purposes. If there are multiple orders for the event, any combination of order types can be used. The following order types are available:

- **AVEO (Audio/Visual Event Order).** The AVEO might span several days.
- **BEO (Banquet Event Order).** Used as guides to event setup by generating BEO reports. This type is intended for covering one day of an event only.
- **No BEO.** This type indicates that the customer must not be invoiced for any line items on the selected order.

Each order is also associated with a price list. The price list determines the list price of each line item in the order. If there is a price list associated with the property where the parent event is located, that price list is the default price list for all the orders associated with the event.

About Order Visibility

As with quotes, order records have visibility requirements that determine which orders the event user can view. The following table lists the types of users and the type of order records they are able to access.

User	Requirement	Visibility Rule
Director of Event Management	View the orders associated with his or her property.	View the orders for the property in the All Event Orders for My Property visibility list.
Corporate Vice President for Event Execution	Query for all orders across Siebel Hospitality.	View the orders for the entire Siebel Hospitality instance in the All Event Orders Across Organizations visibility list.
Regional Event Manager	Query for all orders in his or her property cluster.	View the orders for a cluster of properties in the visibility list.
Event Manager	Review all orders for his or her Orders Team.	View the orders for an Orders Team on his or her home page, and on the Orders screen, My Event Orders visibility list.

About Synchronizing Orders and Quotes

Orders and quotes are separate entities at different stages of the event sales execution. Orders are generated from quotes after the quotes have been detailed as much as possible. Because event managers can modify order functions, line items, and line item attributes, a synchronization process is built into Siebel Hospitality to make sure that any changes made to the order are reflected in the associated quote and also that any changes made at the quote stage are reflected in the associated order. The synchronization process is capable of dealing with both simple and complex products.

Synchronization between orders and quotes operates as follows:

- **Functions.** The function entity is shared between orders and quotes. The same record is used to provide details to both orders and quotes, and so does not have to be synchronized.
- **Line Items.** A two-way synchronization occurs between quote line items and order line items. Whenever an order line item or quote line item is added, modified, or deleted, the associated quote or order line items are updated accordingly. Also, a list of fields, including Product, Quantity, Price, and Discount, are also synchronized for the modified line items.
- **Line Item Attributes.** A two-way synchronization occurs between quote line item attributes and order line item attributes. Whenever an order line item attribute or quote line item attribute is added, modified, or deleted, the associated quote or order line item attributes are updated accordingly. The Value field of the attribute is also synchronized.

About Orders with Meeting Package Components

Meeting package functions and function line items can be associated with orders. For more information about meeting packages, see *About Meeting Packages*.

When a meeting package is booked, components associated with a meeting package administration record are automatically created as associated objects for that booking. These items are known as *core* components. Items that are not associated with any meeting package administration record are known as *noncore* components. A noncore item can be manually associated with a meeting package within an order.

The functionalities that accommodate meeting package functions and function line items in orders are as follows:

- **Add.** You can add noncore functions and associate them with a meeting package that exists in an order. You can add noncore function line items and associate them with the meeting package of the parent function.
- **Update.** In core functions and function line items, most fields cannot be edited.
- **Delete.** Core functions and function line items cannot be deleted. Noncore function line items can be deleted.
- **Cancel.** Core functions cannot be cancelled. Noncore functions can be cancelled.

Scenario for Generating and Managing Event Orders

This topic gives one example of how event orders might be used. You might use the functionality for event orders differently, depending on your business model.

This scenario illustrates a process performed by an event manager to prepare for an upcoming event. The process for generating and managing event orders occurs after the event manager gathers sufficient detail to create the documentation necessary to execute the event.

An event manager generates one or more event orders for a quote. The event manager might generate a primary order for the quote. This information includes all details about function inventory. Alternatively, the event manager might decide to generate a function order for each function associated with a quote.

After the orders have been generated, the event manager continues to modify order line items as necessary to meet billing requirements and other conditions. In addition, the event manager performs other order-related activities such as adding notes or attachments to the order and updating primary orders to function records.

After the order records are created, event managers access different order records according to predefined visibility rules.

Process of Generating and Managing Event Orders

The following list shows tasks event managers typically perform when generating orders and managing order details for a pending event. Your company might follow a different process according to its business requirements.

To generate and manage event orders, perform the following tasks:

1. *Generating Primary Event Orders*
2. *Creating Function Orders*
3. *Changing an Event Order Associated with a Function*
4. *Associating Event Orders with a Function Line Item*
5. *Creating Functions on the Orders Screen*
6. *Managing Meeting Package Orders*
7. *Creating a Hierarchy of Order Functions*
8. *Viewing Line Items for an Event Order*
9. *Adding Notes to an Event Order*
10. *Adding Attachments to an Event Order*
11. *Viewing the Total Discount for an Order*
12. *Viewing Orders Associated with a Quote*
13. *Viewing Event Checks Associated with an Order*
14. *Viewing Event Order Specifications for Orders*
15. *Viewing the Audit Trail for an Order Line Item*

Generating Primary Event Orders

The event manager creates the primary order by clicking Generate Order on the quote form. The default value of the primary order record is the BEO type. When the order is generated, the following quote information is copied to the primary order:

- Account
- Contact
- Sales Team
- Property

- Price List
- Billing Account
- Billing Contact
- Quote #
- Sales Manager
- Event Manager

The primary order record is automatically associated with each function record in the quote, and each function line item is automatically copied to the order record.

This task is a step in *Process of Generating and Managing Event Orders*.

To generate primary event orders

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for the quote record.
3. In the Quote record, click the link in the Quote Name field.

   The application navigates to the Quotes screen, Functions view.
4. From the Quote Functions view, click Create Order.
5. The primary order record is created and the Order screen, Function Line Items view appears.

Creating Function Orders

Function orders can be generated from individual functions associated with a quote. These function orders are used in place of a primary order for the entire quote. When an order is generated from functions, the following information is transferred from the quote to the function orders:

- Header information from the quote, including pricing details
- Line items associated with the function, their asset inventories, and their pricing information
- Event Manager and Sales Manager details

If an order is created at the quote level after function orders have already been generated, all functions and function line items are automatically associated with the primary order. A dialog box is displayed, however, warning you that an order has already been created at the function level and that if you continue and create the primary order, then all function line items are associated with the new order.

This task is a step in *Process of Generating and Managing Event Orders*.

To create a function order

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quote record, click the link in the Name field.
4. In the quote Functions list, select the required function record or multiselect the required function records.
5. From the Functions menu, select Create Function Order.

   The Orders Functions view is displayed, and an order, of the type BEO, with the following characteristics is displayed:

- If you selected one function record, then the order contains one function in the Functions list.
- If you selected multiple function records, then the order contains multiple functions in the Functions list.
- If a primary order already exists when you try to generate a function order, then a dialog box appears informing you that an order already exists for the selected order.
  - If you choose to continue, then the line items for the function order are automatically associated with the new function order. The new order also becomes primary for the function.
  - If you do not want the new order to become primary for the function, click Cancel, and the function order is not created.

Changing an Event Order Associated with a Function

The event manager can change an event order that is associated with a function.

This task is a step in *Process of Generating and Managing Event Orders*.

To change an event order associated with a function

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Orders list, query for and select the required order record.
3. In the Order record, click the link in the Order # field.
4. In the Functions list, query for and select the required function record.
5. In the Function record, click the Select button in the Order # field.
6. In the Orders dialog box, perform one or more of the following actions:
   - In the Selected box, select an old order and click Remove.
   - In the Available box, select a new order and click Add.

   The dialog box displays the orders that have been created from the quote that is associated with the current function.
7. Click OK to accept the changes.

   The function and all its associated line items are removed from the old order and moved to the new order.

Associating Event Orders with a Function Line Item

Function line items can be associated with different orders. When the event manager associates another order with the function line item, the user can select from a list of orders already associated with the function.

This task is a step in *Process of Generating and Managing Event Orders*.

To associate an event order with a function line item

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Orders list, query for and select the order record.

3. In the Order record, click the link in the Order # field.
4. In the Functions list, query for the Function record, and then scroll down to the Line Items list.
5. Select the line item record that you want to associate with an order.
6. In the Order # field, select an order to associate with the line item.

Creating Functions on the Orders Screen

New function and function line item records can be created using the Order screen, Functions view. When the event manager creates function records using the Order screen, the selected order automatically becomes the associated order of the new function. In addition, the line items of the function are synchronized with the Quote screen, Functions view. For more information, see *About Synchronizing Orders and Quotes*.

This task is a step in *Process of Generating and Managing Event Orders*.

To create a function on the Orders screen

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Orders list, query for and select the required order record.
3. In the Order record, click the link in the Order # field.
4. In the Order Functions list, create a new record, and complete the fields.
5. (Optional) Scroll down to the function Line Items list and create new function line items records.
6. Save the record.

Managing Meeting Package Orders

When an order is generated from a quote that includes a meeting package, the quote components that are associated with the meeting package carry over to the order. The meeting package associations of these quote components also carry over to the order.

In orders that have core meeting package components such as functions and line items, these core components cannot be removed. Most fields of these items are read-only and cannot be modified. You can, however, associate noncore components with and dissociate noncore components from an order meeting package. You can also modify noncore meeting package components within an order.

This topic covers the following subjects:

- *Adding Functions to an Order Meeting Package*
- *Adding Function Line Items to an Order Meeting Package*

This task is a step in *Process of Generating and Managing Event Orders*.

Adding Functions to an Order Meeting Package

You can associate noncore functions with a meeting package by following this procedure.

To add a function to an order meeting package

1. Navigate to the Orders screen, then the Event Order view.

2. In the Event Order list, query for and select the required order.
3. In the order record, click the link in the Order # field.
4. Click the Functions view tab.
5. In the Functions list, do one of the following:
   - Select an existing function record.
   - Add a new function record.
6. In the Package field of the function record, select a meeting package with which to associate the function, and click OK.
7. Complete or edit the other fields, as required.

Adding Function Line Items to an Order Meeting Package

You can associate noncore function line items with a meeting package by following this procedure.

To add a function line item to an order meeting package

1. Navigate to the Orders screen, then the Event Order view.
2. In the Event Order list, query for and select the required order.
3. In the order record, click the link in the Order # field.
4. Click the Functions view tab.
5. In the Functions list, select a function record with an associated meeting package.
6. Scroll down and click the Line Items subview tab, if it is not already selected.
7. In the Line Items list, create a new function line item record.
8. Complete the fields, as required.

   Some fields are described in the following table.

Field	Comments
Package	When a noncore function line item is added to a parent function that is associated with a meeting package, the Package field of the line item is set to the meeting package of the parent function. You can manually remove the association of the line item with the meeting package, but you cannot associate the line item with a different meeting package. **CAUTION:** If a noncore function has line items and you update the Package field on the function, the updated value does not automatically cascade to the Package fields of the associated function line items. You must manually update the Package fields on the line items as necessary.
Negotiated Price	When a noncore function line item is associated with a meeting package, the Negotiated Price field is set to 0. Note the following about the negotiated price for noncore meeting package line items: - When a noncore function line item is associated with a meeting package, the Negotiated Price field is set to 0. This is because noncore function line items that are associated with a meeting package must not affect the meeting package price

Field	Comments
	per day. There are scenarios in which a customer wants to add an item to the meeting package for only one function in an event in which that function occurs every day. o For example, a Board Meeting function occurs every day of an event. However, on the first day of the event, the customer requests a large HD LCD TV. The TV is not required for the other days of the event. The customer wants this TV included as part of the meeting package. Because it is not guaranteed that a one-time line item will be added to all days of a “per day" function, that one-time line item does not affect the meeting package price.

Creating a Hierarchy of Order Functions

You can build a three-level hierarchy of parent functions, subfunctions, and child subfunctions. To build a hierarchy of order functions, follow this procedure.

This task is a step in *Process of Generating and Managing Event Orders*.

To create a hierarchy of opportunity functions

1. Navigate to the Orders screen, then the Event Order view.
2. In the Event Orders list, query for an order.
3. In the order record, click the link in the Order # field.
4. In the Functions list, add a function record, and complete the fields.

   Some fields are described in the following table.

Field	Comments
Function Type	Select 24 Hour Hold to make the record a space hold function.
Function Space	Select a function space to associate with the function. Available function spaces for subfunctions are constrained to subdivisions of the parent function space.
Detail	Select to indicate the detailed parent function. For functions for which the Detail check box is not selected, you can define only one hierarchical level, for example, function, then subfunction.

5. Select the primary function and click the Sub Function button to build a hierarchy of subfunctions under the detailed function in the Create Agenda Sub Function dialog box. Select a subfunction and click the Sub Function button to add a child subfunction under the current subfunction in the Create Agenda Sub Function dialog box.

> **Note:** Subfunctions are not indented in the Functions list of the order. To see the child functions of an order function, select the function and click Sub Function again.

For more information about building a hierarchy of subfunctions and child subfunctions under a primary, detailed function, see *Detailing a Function*.

Viewing Line Items for an Event Order

When all necessary line items are included in an order, the event manager views all of the line items in one view. This view provides details of the item quantity, price, discount amount, and so on for each line item. It provides a summary of all items for which the customer is to be charged.

> **Note:** The Order Line Items view is read-only, and no modifications can be made from this view.

This task is a step in *Process of Generating and Managing Event Orders*.

To view line items for an event order

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Event Orders list, query for and select the required event order.
3. Click the link in the Order # field, and then click the Line Items view tab.

   All line items associated with the order appear in the Line Items list.
4. Examine the Revised field to see whether or not the Line Item has been modified since the order was created.

   If there is a flag in this field, then the line item has been modified since the order was created. This means that pricing information for the order can be updated using the Reprice button.

Adding Notes to an Event Order

When necessary, the event manager can create specific notes and associate the notes with an event order. These notes can either be designated as internal (shared with the property staff) or external (public notes that can be shared with the staff and the customer). Some notes appear in sequenced order on generated reports. For more information, see *About the Banquet Event Order Report*.

This task is a step in *Process of Generating and Managing Event Orders*.

To add notes to an event order

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Orders list, query for and select the required order.
3. In the Order record, click the link in the Order # field.
4. Click the Notes view tab, and then select internal or external from the drop-down list.
5. In the Notes list, add a record and select a value in the Type field.
6. In the Note field, enter the note text, and save the record.

The Created By and Sequence # fields are automatically populated.

Adding Attachments to an Event Order

Event Managers can attach documents and other media files to an order. For example, the customer menu requirements might be attached to the order for later reference by event operations personnel.

This task is a step in *Process of Generating and Managing Event Orders*.

To add attachments to an event order

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Orders list, query and select the required order.
3. In the Order record, click the link in the Order # field.
4. Click the Attachments view tab.
5. In the Attachments list, click either New File or New URL, and associate the attachment file or URL.

Viewing the Total Discount for an Order

After the event manager has added all details for an order as necessary, the manager can view the total discount for the order. The total discount for an order is equal to the summation of all the discounts that are applied to the individual order line items.

This task is a step in *Process of Generating and Managing Event Orders*.

To view the total discount for an order

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Orders list, query for and select the required order.
3. Examine the value in the Total Discount field.
   This is the total discount for the order.

Viewing Orders Associated with a Quote

The following procedure details how to view all orders associated with a quote.

This task is a step in *Process of Generating and Managing Event Orders*.

To view orders associated with a quote

1. Navigate to the Quotes screen, then the List view.
2. In the Quotes list, query for and select the required quote record.
3. In the Quotes record, click the link in the quote Name field.

4. Click the Orders view tab.
5. In the Orders list, review the orders.

The user can see more order detail by clicking the link in the Order # field and navigating to the Order screen.

Viewing Event Checks Associated with an Order

When an event check for an order has been generated, it can be accessed using the Event Checks view tab for the order. From this view, it is possible to navigate to the Event Checks screen, and also to post all event checks for the day. For more information about event checks, see *Generating Event Checks*

This task is a step in *Process of Generating and Managing Event Orders*.

To view event checks associated with an order

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Event Orders list, query for and select the required event order.
3. Click the link in the Order # field, and then click the Event Checks view tab.

   The event check associated with the order appears in the Event Checks list.

Viewing Event Order Specifications for Orders

Event order specifications determine the report headers and comments that appear in the line items of Banquet Event Order reports. The Event Order Specifications view includes lists of the following items:

- Report headers that are associated with the property for the event order
- Comments that are associated with the property for the event order
- Comments that are associated with functions for the event order

For information about report headers, see *Configuring Headers for Hospitality Reports*. For information about adding comments for an event order property or function, see *Adding Function-Specific Comments to Quote and Order Report Headers*.

This task is a step in *Process of Generating and Managing Event Orders*.

To view the event order specifications for an order

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Event Orders list, query for and select the required order.
3. Drill down on the link in the Order number (#) field.
4. Click the Event Order Specifications view tab to navigate to that view.

Viewing the Audit Trail for an Order Line Item

When line items for an order are created, updated, or deleted, it is possible to view the audit trail for each line item to see how it was modified, when it was modified, and by whom it was modified. Such information is useful for tracking changes to the order between the time that it was created and when the order is frozen.

For information about configuring the Audit Trail for order line items, see *Siebel Applications Administration Guide* .

This task is a step in *Process of Generating and Managing Event Orders*.

To view the audit trail for order line items

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Event Orders list, query for and select the required order.
3. Click the link in the Order # field, and then click the Line Item Audit Trail tab.
4. Select the required line item in the list, and examine the fields to view changes for the item.

   The following table describes some of the fields.

Field	Comments
Order #	The unique number that identifies this order.
As Of	The date on which the change was made.
Updated By	The User ID of the person who made the change to the line item.
BusComp Name	The name of the business component affected by this change.
Function	The name of the function with which the line item is associated.
Line Item	The line item to which a change has been made.
New Value	This field displays the change that has been made.
Old Value	This field displays the previous value of the line item, prior to the change.

29 Generating Event Checks

Generating Event Checks

This chapter describes how the event manager and sales representatives process event checks and create the Banquet Event Order (BEO) report before an event. It includes the following topics:

- *About Event Checks*
- *Scenarios for Managing Event Checks*
- *Process of Generating Event Checks*
- *About Guest and Accounting Event Check Rules*
- *Event Check Calculation Rules*
- *Workflows for Event Checks Functionality*

About Event Checks

An *event check* is an invoice for an event. Users can open an event check either before, during, or after an event.

About Generating Event Checks

The process of generating an event check requires several subprocesses which take place before and after the event.

If necessary, the event manager can generate a trial check, which can be used to view total owed, the total service charges, or the total taxes for the event, and these amounts can be quoted to the customer. Generating a trial check does not lock the order, so that modifications can be made to the order after the trial check has been generated. The trial check can be generated many times before the event occurs.

After the event manager is satisfied that all details for the order have been added to the order record, that manager can generate an event check. When the event check is generated, the order is locked, and no more changes can be made to the order. When an event check is opened, the Event Check header is created, and a unique number is assigned.

The event check process is usually initiated a few days before the event date. During this period, the operations team member can continue to add products to the orders as line items. The products can have different taxes and service charge inclusions, which determine the way event checks are generated and displayed.

About Package Event Checks

A *package event check* is a separate event check that is generated from an event order associated with a quote that has meeting package items. The package event check includes all meeting packages and their associated accommodations, functions, and function line items from the associated quote. The package event check also includes all nonfunction line items from the quote. The non-meeting package items from that quote are included in separate, non-package event checks, one to an order.

A package event check is generated if an order function has any meeting package elements, if nonfunction line items are available in the quote, or if meeting package accommodations are available in the quote. Only one package event check is generated for a quote with meeting package-related items, even if that quote has multiple orders. By contrast, if a quote has multiple orders, then one non-package event check results from the non-meeting package items for each order of the quote.

If a quote has no meeting packages but does have nonfunction line items, then the first time an event check is generated from an order of that quote, an event check is generated with the functions and function line items from the order. Additionally, a package event check is generated only with all nonfunction line items of the quote. Subsequent event checks generated from other orders of the quote contain only the functions and function line items of their respective orders.

You can add and edit meeting packages and their elements on a package event check that has not been posted. You cannot add meeting package elements to any non-package event check.

Scenarios for Managing Event Checks

This topic describes how event checks might be used by a hospitality property. You might use event checks differently, depending on your business model. This topic includes the following scenarios:

- *Generating Event Checks*
- *Generating a Package Event Check*

Generating Event Checks

A few days before an event, an event manager generates a trial event check, including total amount due, service charges, and tax information, and provides it to the customer. The event manager also prints a BEO report and distributes it to all operations personnel. The operations personnel then use this report to verify the correct delivery of products for the event.

As the event begins, the operations team records the actual items consumed at the event. After the event has concluded, an event manager or an operations team member revises the line items specified in the event check, to make sure that it is up to date. This process helps event management verify that the event check represents the actual quantities and items used for the event.

When the updating process is complete, the event manager generates the event check, which freezes the order. At this point no more changes can be made to the order. However, line items can be added to the event check if necessary.

After the event check has been generated, the event manager posts it to the customer. If changes must be made after the event check is posted, then the posted event check is cancelled. The user updates a copy of the cancelled event check and posts the new version of the check.

Generating a Package Event Check

A sales representative for a property creates a quote that includes a meeting package as well as other, non-meeting package items. Later, the Event Manager for that property creates three event orders from the quote. On the day of the

event, the Banquet Manager opens an event check against the first event order. Siebel Hospitality creates two event checks, as follows:

- A package event check that stores only the meeting package items and nonfunction line items from the quote
- A non-package event check that stores the non-meeting package items from the first event order only

The Banquet Manager then opens an event check on the second order. Only the non-meeting package items from the second order are stored on this newly created event check. Finally, the Banquet Manager opens an event check on the third order. Likewise, only the non-meeting package items from the third order are stored on the subsequent event check. This is because all the meeting package items from the second and third orders have already been placed on the package event check.

Process of Generating Event Checks

This topic lists the tasks typically performed by operations team members when creating and posting an event check. Your company might follow a different process according to its business requirements. These nonsequential procedures can be performed as many times as necessary before and after the event occurs.

To create and generate event checks, perform the following tasks:

- *Generating Trial Checks*
- *Updating Event Orders*
- *Generating Event Checks*
- *Adding, Changing, and Recalculating Event Check Line Items*
- *Adding Meeting Packages to a Package Event Check*
- *Adding Meeting Package Functions to a Package Event Check*
- *Adding Nonfunction Line Items to a Package Event Check*
- *Splitting Event Checks*
- *Moving Line Items Between Event Checks*
- *Viewing Billable and Nonbillable Event Check Line Items*
- *Posting Event Checks*
- *Reviewing Event Checks*
- *Cancelling Posted Event Checks*

Generating Trial Checks

When a trial check is generated, an event check total is calculated for the selected event order that includes taxes and service charges. Generating a trial check allows the operations manager to review and update order details before the final event check is generated and posted. A trial check can be generated multiple times before, during, and after the event. However, the trial check can only be generated before an event check is opened.

This task is a step in *Process of Generating Event Checks*.

To generate a trial check

1. Navigate to the Service Orders screen, then the Event Order view.

2. In the Event Orders list, query for and select the event order.
3. In the Event form, click Trial Check.

   One or more event checks are generated for the selected order. For more information about the resulting event checks, see *About Generated Event Checks*.

Updating Event Orders

Orders are updated many times before the actual event occurs. The operations staff associates product records with the order function line items to fulfill the order requirements. Orders can be updated before or after the trial check is generated. The product type (simple or complex) determines how the product appears on the event check.

When the operations team member associates products with the order, the member also enters tax and service charge inclusions by selecting flags (check boxes) on the product record. The tax and service charge inclusion flags affect the way the event checks are generated and displayed.

Use the following procedure to associate products with an order and designate the tax and service charge options.

This task is a step in *Process of Generating Event Checks*.

To update an event order

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Event Orders list, query for the order record.
3. In the Order record, click the link in the Order # field.
4. In the Order Functions list, query for the function.
5. Scroll down to the Line Items list, and then create a new line item.
6. In the new Line Item record, click the select button in the Item field to associate a product with the line item.
7. Select the appropriate Tax and Service Charge flags that apply to the product record, and then save the record.

   Some flags are described in the following table.

Flag	Comments
Tax Inclusive	When selected, indicates that the list price for the line item includes any applicable taxes. No additional tax charges are calculated.
Service Charge Inclusive	When selected, indicates that service charges are included in the price. No additional service charges are calculated.
Complimentary	When selected, prevents any charge for the selected line item by setting the item's price to zero and automatically selects the Waived check box. When selected for a line item that is a complex product, this flag sets the price to zero for each subsidiary line item. This flag is typically used for an item that is always provided at no charge.
Waived	When selected, prevents any charge for the selected line item by setting the item's price to zero. When selected for a line item that is a complex product, this flag also sets the

Flag	Comments
	price to zero for each subsidiary line item. This flag is automatically selected when the Complimentary check box is selected. This flag is typically used when the regular charge for the item has been dropped as a result of negotiations with the customer. The price for the product is waived if the customer either is not satisfied with the product itself, or is not satisfied with the delivery of the product.

Generating Event Checks

Operations managers and event managers can generate an event check for a single order, or event checks for all orders in a day for a property. When an event check is generated, the following actions occur in the order:

- An event check header is created.
- The Event Check number (#) field for the order is populated with a unique identifier.
- The Order Status field is updated to Event Check.
- Taxes and service charges for the event are calculated.
- If the event check is generated with a Status of Open, then the order and its associated functions are read-only in the originating quote.

You can navigate to the Event Checks screen to see more detail about the generated event check. You must cancel an event check before you can use the procedures in this topic to generate another event check for the same order.

This task is a step in *Process of Generating Event Checks*.

Generating an Event Check for a Single Order

To generate an event check for a single order, follow this procedure.

To generate an event check for a single order

1. Navigate to the Service Orders screen, then the Event Order view.
2. In the Event Orders list, query for and select the required order.
3. Click Open Check.

   One or more event checks are generated for the selected order. For more information about the resulting event checks, see *About Generated Event Checks*.

Generating Event Checks for All Orders in a Day for a Property

Operations managers and event managers can generate event checks for all orders in a specified day for a specified property. To generate event checks for all orders in a day for a property, follow this procedure.

To generate event checks for all orders in a day for a property

1. Navigate to the Service Orders screen, then the Event Order view.
2. Click Open Day.

3. Change the date to the required date and select a property.

   You can select only the properties to which you have access.
4. Click Open Checks.

   An event check is generated for each order that has a function for the specified date and property. For more information about the resulting event checks, see *About Generated Event Checks*.

About Generated Event Checks

For each generated event check, one of the following results occurs:

- If the related quote has no applied meeting packages or nonfunction line items, then Siebel Hospitality generates a single event check.
- If the related quote has an applied meeting package, then Siebel Hospitality creates a package event check for all the meeting package elements on the related quote and another, non-package event check for the non-meeting package elements on that order. The package event check includes all the meeting package functions and function line items, as well as all the nonfunction line items, from the related quote.

  Each event check that is subsequently generated from another order of the same quote includes only the non-meeting package elements on that order, and none of the nonfunction line items on that order.
- If the related quote has no applied meeting packages but does have nonfunction line items, then Siebel Hospitality generates an event check that includes the functions and function line items on the order, and a package event check that includes all the nonfunction line items on the related quote.

  Each event check that is subsequently generated from another order of the same quote includes only the functions and function line items on that order.

The event checks are generated, and the Event Checks screen, Line Items (Guest) view appears. The detailed event check records appear in the Event Checks screen list. In each package event check record, the Package Event Check check box is selected. Meeting package elements, if any, are displayed on the Meeting Packages and Meeting Functions views. Nonfunction line items, if any, are displayed on the Non Function Line Items view.

For trial event checks generated with the Trial Check button, the Status fields of the event check records are set to Trial. For event checks generated with the Open Check and Open Day buttons, the Status fields of the event check records are set to Open. The Post Date fields remain blank. The event check line items show all the applicable taxes and service charges.

Adding, Changing, and Recalculating Event Check Line Items

To add, change, and recalculate event check line items, follow the procedures in this topic.

This task is a step in *Process of Generating Event Checks*.

Adding or Changing Line Items in an Event Check

Event managers generate event checks when they believe that all details about the event are included in the order. However, after the event check is generated, the event manager might notice that a product that was used at the event is not included the order. In this case, the event manager can add extra line items for the product to the event check.

> **Note:** Siebel Hospitality keeps the quote, order, and event check in sync. Consequently, if you add or modify an item in an event check, then the same modification occurs automatically in the associated order and quote.

To add or change line items in an event check

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check number (#) field, and then click the Functions view tab.
4. In the Functions list, select the function for which to add or change line items.
5. Scroll down to the Line Items list, and create new records to add line items as required, or change the existing line items as required.
6. Click the Line Item Attributes link, and change the attributes for each line item as required.
7. Select each added or changed item in the Line Items list, and click Reprice to update the total price for the line item.

Recalculating Taxes and Service Charges for an Event Check

After the event manager adds line items or modifies existing line items, the Recalculate flag for the event check is automatically selected. Consequently, the event manager must automatically recalculate the taxes and service charges for the event check.

To recalculate taxes and service charges for an event check

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. In the Event Check form, click Recalculate.

   The taxes and service charges for the event are recalculated.

Adding Meeting Packages to a Package Event Check

You can add a meeting package to a package event check that has not been posted. You cannot delete applied meeting packages from an event check. To add a meeting package to an event check, follow this procedure.

This task is a step in *Process of Generating Event Checks*.

To add a meeting package to a package event check

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for event checks that have the Package Event Check field selected.

   The Event Checks list displays only package event checks.
3. In the Event Checks list, find the required event check.
4. Click the link in the Event Check number (#) field, and then click the Meeting Packages view tab.

   The Meeting Packages view displays meeting packages that are associated with the current event check.

   > **Note:** For non-package event checks, this view is disabled and does not display any data.

5. In the Meeting Packages list, add a meeting package and complete the fields, as required.

   Some fields are described in the following table.

Field	Description
Name	Name of meeting package.
Display Name	Enter the name of the package as you want it to be displayed on event check reports. Must be unique.
Description	Read only. Description of the meeting package from the meeting package administration record.
Action	Add is the only valid option for a meeting package that has not yet been applied.
Start Date	The Start Date for the meeting package.
Duration (Days)	Duration of the meeting package. Cannot be more than eight days. **Note:** If you want to decrease the Duration of a meeting package that has already been applied, and a related event check with meeting package elements has already been posted, then void the posted event check and then make the necessary changes. These changes might include decreasing the duration of the applied meeting package and then re-posting the line items as part of a noncore, non-package function.

6. Scroll down to the Package Types list and view or modify the attendance details, as required. Some fields are described in the following table.

Field	Description
Name	Read only. Name of the item, either Day Delegate or a sleeping room type.
Room Allocation	Read Only. The adjusted price for each room from the meeting package administration record.
List Pkg Price/Day	Read Only. The calculated price per day. This includes the allocations for all items and rooms.
Day 1...Day n	The user-defined attendance numbers for each day of the event. These numbers control the quantities of function line items, nonfunction line items, and sleeping rooms.

7. Click Apply Package.

Siebel Hospitality applies the validations described in *About Apply Package Validations*. If the new record passes the validations, then Siebel Hospitality creates the functions, function line items, nonfunction line items, room blocks, and room block line items for the meeting package according to the value in the Action field of the meeting package. Siebel Hospitality then calculates the total price for each SR Type from the number of attendees and rooms, and displays these values in the List Pkg Price/Day fields of the Package Types list.

8. Display more or less detail in the Package Types list by doing the following:
   - Click Expand All to display all occupancies for all SR Types.
   - Click Collapse All to display only the SR Types and hide the occupancies.

For more information about the field values and processing functionality of the Meeting Packages view, see *Adding Meeting Packages to a Quote*.

> **CAUTION:** New meeting package functions that are created as a result of applying a meeting package to a package event check are *not* automatically added to the associated event order. You must manually create or associate orders for the new functions in the Quote screen. For more information, see *Creating Function Orders*.

Adding Meeting Package Functions to a Package Event Check

You can add a function to a package event check that has not been posted, then add that function to a meeting package that is associated with the event check. You can then add line items to the function. To add a meeting package function and line items to an event check, follow this procedure.

This task is a step in *Process of Generating Event Checks*.

To add a meeting package function to a package event check

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for event checks that have the Package Event Check field selected.

   The Event Checks list displays only package event checks.
3. In the Event Checks list, find the required event check.
4. Click the link in the Event Check number (#) field, and then click the Meeting Functions view tab.

   The Meeting Functions view displays meeting package functions that are associated with the current event check.

   > **Note:** For non-package event checks, this view is disabled and does not display any data.
5. In the Meeting Functions list, add a function and complete the fields, as required.

   Some fields are described in the following table.

Field	Description
Core	Read only. If this function was automatically added as part of a meeting package (that is, if this is a core item), then this check box is selected. If this function was manually added to the event check (that is, if this is a noncore item), then this check box is cleared.

Field	Description
Package	Name of the associated meeting package. Read only for core functions, editable for noncore functions.

6. Scroll down to the Line Items list, and create new records to add line items as needed.
7. Complete the fields for each new line item, as required.

   Some fields are described in the following table.

Field	Description
Core	Read only. If this item was automatically added as part of a meeting package (that is, if this is a core item), then this check box is selected. If this item was manually added to a function (that is, if this is a noncore item), then this check box is cleared.
Package	Name of the associated meeting package. Read only for core items, editable for noncore items. When a noncore function line item is added to a meeting package function, the default value of this field is the meeting package of the parent function. **CAUTION:** If a noncore function has line items and you update the Package field on the function, the updated value does not automatically cascade to the Package fields of the associated function line items. You must manually update the Package fields on the line items as necessary.

8. Select each added or changed item in the Line Items list, and click Reprice to update the total price for the line items.

   The Negotiated Price for noncore function line items associated with a meeting package is set to 0 and is read only. This is because noncore function line items cannot affect the meeting package price.

Adding Nonfunction Line Items to a Package Event Check

Nonfunction line items are only displayed for package event checks. The package event check for a quote displays all core and noncore nonfunction line items for that quote. You can delete noncore nonfunction line items from an event check, but you cannot delete core nonfunction line items.

You can add nonfunction line items to a package event check that has not been posted, then add the nonfunction line items to a meeting package that is associated with the event check. To add nonfunction line items to an event check, follow this procedure.

This task is a step in *Process of Generating Event Checks*.

To add a nonfunction line item to a package event check

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for event checks that have the Package Event Check field selected.
   The Event Checks list displays only package event checks.
3. In the Event Checks list, find the required event check.
4. Click the link in the Event Check number (#) field, and then click the Non-Function Line Items view tab.
   The Non-Function Line Items view displays meeting package functions that are associated with the current event check.

   Note: For non-package event checks, this view is disabled and does not display any data.

5. In the Non-Function Line Items list, create new records to add line items as needed.
6. Complete the fields for each new nonfunction line item, as required.
   Some fields are described in the following table.

Field	Description
Core	Read only. If this item was automatically added as part of a meeting package (that is, if this is a core item), then this check box is selected. If this item was manually added to a function (that is, if this is a noncore item), then this check box is cleared.
Package	Name of the associated meeting package. For core items, this field is read only. For noncore items, this field is null and can be associated with any meeting package on the quote if one of the following conditions is met: o The Posting Rhythm of the item is Per Day. o The number of attendees and occupancies is the same for each day of the event.

7. Select each added or changed item in the Non-Function Line Items list, and click Reprice to update the total price for the line items.

Splitting Event Checks

To generate multiple event checks for a single function, you can split (or divide) the event check that includes that function. After you split an event check, you can split both of the two resulting event checks.

To split an event check, you must select parent line items, and not child line items. When you select a parent item, all of the associated child items are automatically included in your selection. Taxes and service charges are automatically recalculated for the line items in the event checks that result when you split an event check.

Note: You cannot split meeting packages, meeting package types, accommodations, or function line items from a package event check.

This task is a step in *Process of Generating Event Checks*.

To split an event check

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check number (#) field, and then click the Functions view tab.
4. In the Functions list, select the function for which to split the event check.

   Note: You cannot split an event check for more than one function at a time.

5. Scroll down to the Line Items list, and select the parent line items to include in the new event check.

   When you split the event check, the parent line items that you do not select (and the associated child line items) remain on the existing event check.
6. Click Split Check.

   The new event check appears. This new event check includes the parent line items that you selected and the associated child line items.

Moving Line Items Between Event Checks

If multiple event checks exist for an event order, you can move line items between those event checks. If the destination event check includes the function for the line items to move, you can move the line items only to that function (and not to other functions) on the destination event check.

If the destination event check does not include the function for the line items to move, then that function is automatically created when you move the line items to the destination event check. If the destination event check does not include parent function for a subfunction or breakout function for the line items to move, then that parent function is not automatically created on the destination event check.

To move line items between event checks, you must select parent line items, and not child line items. When you select a parent item, all of the associated child items are automatically included in your selection. Taxes and service charges are automatically recalculated for the line items that you move between event checks.

Note: You cannot move meeting packages, meeting package types, accommodations, or function line items out of a package event check. You cannot move line items into a package event check.

This task is a step in *Process of Generating Event Checks*.

To move line items between event checks

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check number (#) field, and then click the Functions view tab.
4. In the Functions list, select the function for which to move line items between event checks.

   Note: You cannot move line items between event checks for more than one function at a time.

5. Scroll down to the Line Items list, and select the parent line items to move from this event check to another event check.
6. Click Move.

A dialog box appears showing all of the event checks for the event order that is associated with the event check that you selected.

7. In the dialog box, select the destination event check, and then click OK.

   The destination event check appears. This destination event check includes the parent line items that you selected and the associated child line items.

Viewing Billable and Nonbillable Event Check Line Items

Before you post an event check, you can view billable and nonbillable line items that are associated with the event check. Billable items, not nonbillable items, determine the total amount of the event check and the related taxes and service charges.

This task is a step in *Process of Generating Event Checks*.

To view billable and nonbillable event check line items

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click the link in the Event Check number (#) field, and then click the Functions view tab.
4. In the Functions list, select the function for which to view line items.
5. Scroll down to the Line Items list, select a line item, and examine the Billable field.

   All simple products appear in the Line Items list. The Billable field is checked for billable line items.

   For complex products, the Billable flag is not selected for child products and is selected for the parent products. If the Billable flag is not selected, the product does not appear in the Line Items (Guest) view when the event check is calculated.

Posting Event Checks

After event checks are complete, the event manager can post a single event check, or all the event checks in a specified day for a specified property.

This task is a step in *Process of Generating Event Checks*.

Posting a Single Event Check

To post a single event check, follow this procedure.

To post a single event check

1. Navigate to the Event Check screen, then the Event Checks List view.
2. In the Event Checks list, query for and select an event check with a function date that is earlier than or equal to the current date.

   If any function in the event check is future-dated, then you cannot post the event check.
3. Click Post Check.

When you post an event check, the event check total (including taxes and service charges) for the order is calculated and included in the event check.

After you post an event check, the Line Items (Guest) view of the Event Checks screen appears. In this view, you can verify that the required taxes and service charges are included in the calculation. After you post an event check, the Status field in the order is automatically set to Closed, and the Status field in the event check record is automatically set to Posted.

> **Note:** You cannot change a posted event check, but you can cancel it. For more information, see *Cancelling Posted Event Checks*.

Posting Event Checks in a Day for a Property

After event checks are complete, the event manager can post the event checks in a specified day for a specified property. To post event checks in a day for a property, follow this procedure.

To post event checks in a day for a property

1. Navigate to the Event Check screen, then the Event Checks List view.
2. Click Post Day.
3. Change the date to the required date, select a property, and then click Post Checks.

   You can select only the properties to which you have access.

   Each event check that has a function for the specified date and property is posted. An error message appears if no event checks are associated with the specified date and property, and you cannot post any checks for that date.

Reviewing Event Checks

Event Managers can review event checks that are generated for the customer and for the accounting department of the property. The event manager reviews the individual event check line items and verifies items that have Tax and Service Charge inclusive flags selected.

This task is a step in *Process of Generating Event Checks*.

To review event checks

1. Navigate to the Event Check screen, then the Event Checks List view.

   Use the Visibility filter to show All Event Checks, or All Event Checks Across Organizations.
2. In the Event Checks list, query for and select the required event check record.
3. In the Event Check record, click the link in the Event Check # field.
4. From the Event Check form, click the Line Items (Guest) view tab to review customer invoice items.
5. Click the Line Items (Accounting) view tab to review event check line items for accounting.
6. Click the Notes view tab to review other information entered about the event.

Cancelling Posted Event Checks

You cannot change posted event checks. If an event manager finds a problem with an event check, then the event manager must cancel the original event check and post an updated version of it.

This task is a step in *Process of Generating Event Checks*.

To cancel a posted event check

1. Navigate to the Event Checks screen, then the Event Checks List view.
2. In the Event Checks list, query for and select the required event check.
3. Click Void Event Check.

   A confirmation message appears stating that a new event check will be opened and that you can change the information in this new event check.
4. Click OK to continue the event check cancellation process.

   A message appears stating that you must enter text in the Void Reason field.
5. Scroll down to the Event Check form, and enter text in the Void Reason field.

   If necessary, click the Show More button to see the field.

   A new version of the cancelled event check appears in the Event Checks screen. This new event check has a new event check number and the same order number as the cancelled event check.
6. Update the new event check and post it.

   For more information on posting an event check, see *Posting Event Checks*.

About Guest and Accounting Event Check Rules

Operations managers can review event checks that are generated for the customer and for the accounting department of the property using the Event Checks screen.

Siebel Hospitality uses a set of rules when generating and displaying the final Guest Event Check and Accounting Event Check. These rules depend on a number of factors, including the Product Type, Parent Product Type, and any Tax and Service Charge inclusions specified for the order line items.

There are two types of products, simple and complex. Simple products are stand-alone products that do not have associations with parent or child product records. For example, a simple product might be a projector required for a meeting function. Complex products are associated with either parent or child records (and in some cases, complex products are associated with both). Examples of complex products are menus and packages. For more information on menus and packages, see *Managing Property-Specific Menus and Packages*.

Siebel Hospitality validates the product type against the set of rules to determine how to calculate and display the function line items on each Event Check type. The Tax and Service Charge inclusions are then applied to calculate each function line item price.

For example, when an Event Check (or a Trial Check) is posted for simple function line items that are tax and service charge inclusive, the Guest Event Check shows the total amount paid by the customer. If an item is 100.00 and it is

flagged tax and service charge inclusive, the customer sees only 100.00 on the check. The Guest Event Check displays the Original Total Price for that line item.

The Accounting Event Check, however, shows the pretax and service charge deduction price. For the 100.00 item, assuming the Tax and Service Charge flags are checked, the product's price is shown as 82.00, and on separate lines in the event check, an 8.00 tax and a 10.00 service charge are listed for a total of 100.00. The Account Event Check displays an Adjusted Total Price for that line item.

Event Check Calculation Rules

The tables in the following topics describe the rules that your Siebel application uses to generate and display guest event check and accounting event check records in the user interface views:

- *Meeting Package Products*.
- *Simple and Generic Products*.
- *Parent Products with Child Records*.
- *Mid-Tier Products with Parent and Child Records*.
- *Child Products Without Child Records*.

These rules depend on a number of factors, which include the Product Type, Parent Product Type, and any Tax and Service Charge inclusions specified for the order line items. Function line items and nonfunction line items follow the same rules. Some terms used in the event check calculation rules are described in the following table.

Term	Comments
Original Total Price	Extended Net Price of the item.
Adjusted Total Price	Extended Net Price of the item, minus applicable taxes and service charges if the line item is Tax/SC Inclusive.
Total Adjusted Allocation	Per Person Allocation of the item, minus any taxes and service charges if the item is Tax/SC Inclusive.

Event check characteristics that relate to meeting packages are as follows:

- A package product (as defined in *About Managing Menus and Packages*) cannot be part of a meeting package (as defined in *About Meeting Packages*).
- Items that are part of a meeting package display a value of 0 in the Guest Event Check view, but display Included in the Guest Event Check Report and the Pro Forma Event Check Report.

Meeting Package Products

The rules for determining the event check calculation method for meeting package records are shown in the following table.

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The line item is a Package Type (that is, meeting package) record.	Yes	List Package Price/Day	0	Guest: — Item A = 100.00 Accounting: — Item A = 0
The line item is an accommodation record.	Yes	List Package Price/Day	Room Allocation	Guest: — Item A = 0 Accounting: — Item A = 100.00
The line item is an accommodation record.	No	Not displayed.	Not displayed.	Not applicable.

Simple and Generic Products

The rules for determining the event check calculation method for simple and generic products are shown in the following table.

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The line item is a Generic product or a Simple product.	No	Original Total Price	Adjusted Total Price	Guest: — Item A = 100.00 Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00
The line item is a Generic product or a Simple product.	Yes	0	Adjusted Total Price	Guest: — Item A = 0 Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example

Parent Products with Child Records

The rules for determining the event check calculation method for parent products with child records are shown in the following table.

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The line item is a Package Per Person.	N/A	Original Total Price	0	Guest: — Item A = 100.00 Accounting: — Item A = 0
The line item is a Package Each.	N/A	Original Total Price	0	Guest: — Item A = 100.00 Accounting: — Item A = 0
The line item is a Package Item Price.	N/A	Not displayed.	0	Guest: — Item A = Not applicable. Accounting: — Item A = 0
The line item is a Menu Per Person without Split Items.	No	Original Total Price	Adjusted Total Price	Guest: — Item A = 100.00 Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00
The line item is a Menu Per Person without Split Items.	Yes	0	Adjusted Total Price	Guest: — Item A = 0

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example
				Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00
The line item is a Menu Per Person with Split Items.	N/A	Not displayed.	Not displayed.	Guest: — Item A = Not applicable. Accounting: — Item A = Not applicable.

Mid-Tier Products with Parent and Child Records

The rules for determining the event check calculation method for mid-tier products with parent and child records are shown in the following table.

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The line item is a Menu Per Person without split items and the parent is a Package Per Person.	N/A	Not displayed	Total Adjusted Allocation	Guest: — Item A = Not applicable. Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00
The line item is a Menu Per Person with split items and the parent is a Package Per Person.	N/A	Not displayed	Not displayed	Guest: — Item A = Not applicable. Accounting: — Item A = Not applicable.
The line item is a Package Per Person and the parent is a Package Per Person.	N/A	Not displayed	0	Guest: — Item A = Not applicable. Accounting:

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example
				— Item A = 0
The line item is a Package Per Person and the parent is a Package Item Price.	N/A	Original Total Price	0	Guest: — Item A = 100.00 Accounting: — Item A = 0
The line item is a Package Each and the parent is a Package Item Price.	N/A	Original Total Price	0	Guest: — Item A = 100.00 Accounting: — Item A = 0
The line item is a Package Each and the parent is a Package Per Person.	N/A	Not displayed	0	Guest: — Item A = Not applicable. Accounting: — Item A = 0
The line item is a Package Item Price and the parent is a Package Each/Package Per Person.	N/A	Not displayed	0	Guest: — Item A = Not applicable. Accounting: — Item A = 0
The line item is a Menu Per Person without split items and the parent is a Package Item Price.	N/A	Original Total Price	Adjusted Total Price	Guest: — Item A = 100.00 Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00

Child Products Without Child Records

The rules for determining the event check calculation method for child products without children are shown in the following table.

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example
The parent line item is a Menu Per Person without Split Items.	N/A	Not displayed	Not displayed	Guest: — Item A = Not applicable. Accounting: — Item A = Not applicable.
The parent line item is a Menu Per Person with Split Items and the line item is not a Split Item.	N/A	Not displayed	Not displayed	Guest: — Item A = Not applicable. Accounting: — Item A = Not applicable.
The parent line item is a Menu Per Person with Split Items and the line item is a Split Item.	No	Original Total Price	Adjusted Total Price	Guest: — Item A = 100.00 Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00
The parent line item is a Menu Per Person with Split Items and the line item is a Split Item.	Yes	0	Adjusted Total Price	Guest: — Item A = 0 Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00
The parent line item is a Package Per Person.	N/A	Not displayed	Total Adjusted Allocation	Guest: — Item A = Not applicable. Accounting:

Criteria	Part of a Meeting Package?	Shown on Guest Event Check	Shown on Accounting Event Check	Example
				— Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00
The parent line item is a Package Each.	N/A	Not displayed	Total Adjusted Allocation	Guest: — Item A = Not applicable. Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00
The parent line item is a Package Item Price.	N/A	Original Total Price	Total Adjusted Allocation	Guest: — Item A = 100.00 Accounting: — Item A = 80.00 — Item A Tax = 20.00 — Item A Total = 100.00

Workflows for Event Checks Functionality

This topic describes workflows for Event Checks functionality in Siebel Hospitality. By modifying these workflows, you can configure the Event Checks functionality according to the business requirements of your company. For more information about workflows, and about customizing workflows, see *Siebel Business Process Framework: Workflow Guide* .

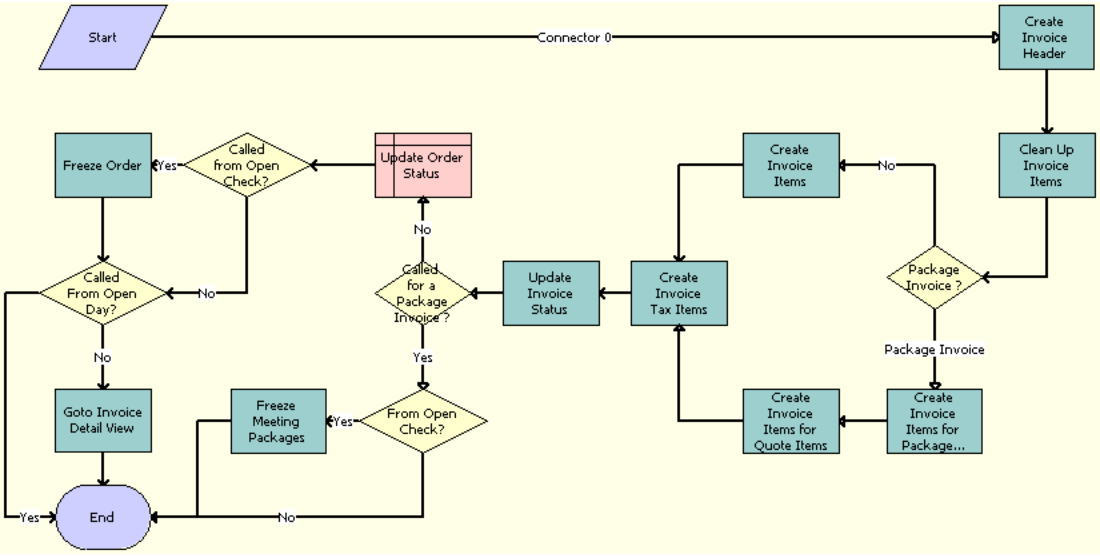
This topic includes the following topics:

- *SHM Trial_Open Check Workflow*
- *SHM Post Check Workflow*
- *SHM Recalculate Invoice Items Workflow*
- *TNT Wrapper Trial_Open Check Workflow*
- *TNT Apply Package Workflow*

SHM Trial_Open Check Workflow

This workflow process is called as a sub-workflow of the *TNT Wrapper Trial_Open Check Workflow* when a user clicks either the Open Check button or the Trial Check button. This workflow process creates an Event Check with a Status of Open or Trial, depending on the button that is clicked.

The following image shows this workflow.



Workflow Description. This workflow performs the following actions:

1. **Create Invoice Header.** Creates the invoice header from the originating order.
2. **Clean Up Invoice Items.** If an event check is regenerated from the order, then this step deletes the invoice items.
3. **Package Invoice?** Decides whether or not to create invoice items for order function items or meeting function items.
4. **Create Invoice Items.** Creates invoice items for order function line items that are not part of a meeting package.
5. **Create Invoice Items for Package Types.** Creates invoice items for meeting package types.
6. **Create Invoice Items for Quote Items.** Creates invoice items for meeting function items or nonfunction line items.
7. **Create Invoice Tax Items.** Business service step to create taxes & service charges for newly created invoice items.
8. **Update Invoice Status.** Business service step to assign respective status (Trial or Open) to newly created invoice.
9. **Called for a Package Invoice?** Decides whether or not to update the order Status. If this workflow is called to generate a meeting package event check, then the order Status is not set.
10. **From Open Check?** If this workflow is called to generate a meeting package event check with a Status of Open, then this step decides whether or not to lock the meeting packages and meeting functions.
11. **Freeze Meeting Packages.** Locks meeting packages and their functions on the quote for which the event check has been generated.
12. **Update Order Status.** Assigns a Status value (either Trial Check or Event Check) to the originating order for which the event check is generated.
13. **Called from Open Check?** If the workflow is called to generate an event check with a Status of Open, then this step locks the order functions.
14. **Freeze Order.** Locks the order functions that are not part of any meeting package.

15. **Called From Open Day?** If the workflow is called to generate an event check with a Status of Open Day, then this step prevents navigation to the Invoice Detail view by ending the workflow.
16. **Goto Invoice Detail View.** Navigates to the Invoice Detail view.

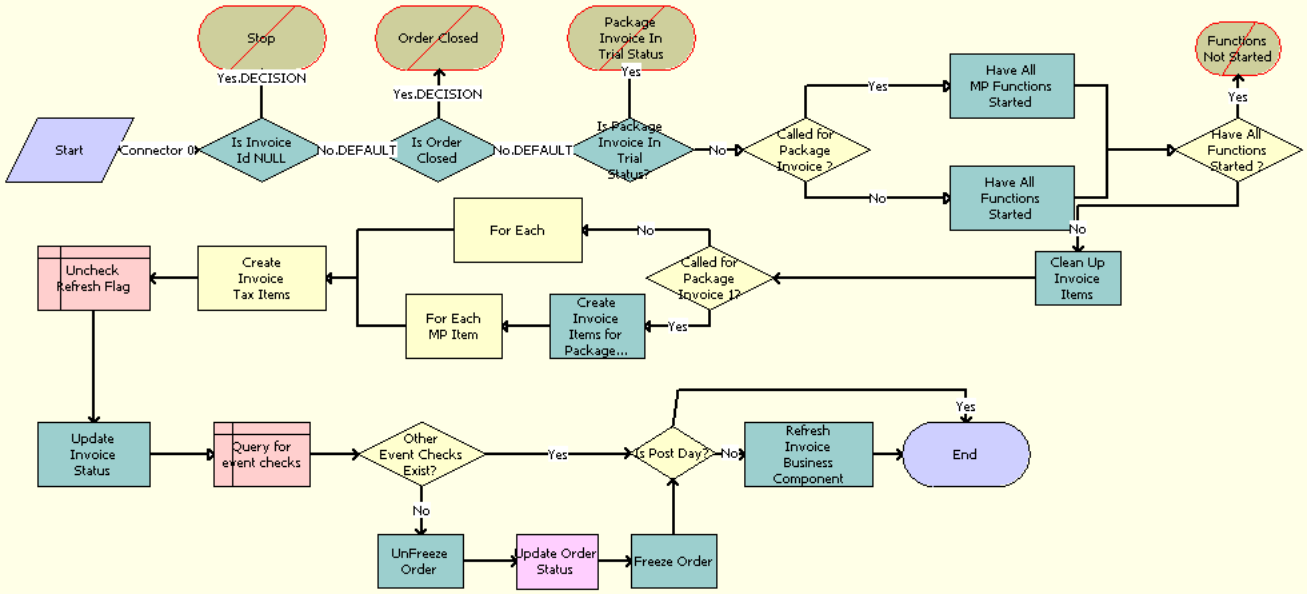
Associated Business Service Methods. The following table shows the steps in this workflow that call business service methods.

Workflow Step	Method Called	In Business Service
Create Invoice Header	Data Transfer	FINS Data Transfer Utilities
Clean Up Invoice Items	Clean Up Invoice Items	SHM Invoice Process
Create Invoice Items	Accumulate	SH For
Create Invoice Items for Package Types	Create Package Type Invoice Items	SHM Invoice Process
Create Invoice Items for Quote Items	Accumulate	SH For
Create Invoice Tax Items	Create Invoice Tax Items	SHM Invoice Process
Update Invoice Status	Set Status	SHM Invoice Process
Freeze Meeting Packages	Data Transfer	FINS Data Transfer Utilities
Freeze Order	Freeze Order	TNT SHM Order Service
Goto Invoice Detail View	GotoView	TNT SHM Workflow UI Service

SHM Post Check Workflow

This workflow process checks whether or not the selected order is associated with an event check. If the order is associated with an event check, then it deletes the line items from the event check, creates new line items including line items for each tax and service charge, and sets the event check status to Posted.

The following image shows this workflow.



Workflow Description. This workflow performs the following actions:

1. **Is Invoice Id NULL.** Verifies whether or not the workflow is called for a valid event check.
2. **Is Order Closed.** Verifies whether or not the workflow is called for a posted event check.
3. **Is Package Invoice In Trial Status?** If any meeting function is part of the current event check, then this step verifies whether or not the calling of this workflow is valid.

   > **Note:** If a meeting package event check does not have a Status of Trial, then the event check cannot be posted.

4. **Called for Package Invoice?** Verifies the function dates, either for all meeting package functions or for all order functions.
5. **Have All MP Functions Started.** Verifies whether or not the function dates of all the meeting packages are less than or equal to the current date.
6. **Have All Functions Started.** Verifies whether or not the function dates on the order are less than or equal to the current date.
7. **Have All Functions Started?** Decides whether or not to generate a validation error for function dates.
8. **Clean Up Invoice Items.** Deletes the invoice items.
9. **Called for a Package Invoice 1?** Decides whether or not to create invoice items for order function items or meeting function items.
10. **For Each.** Creates invoice items only for order function items that are not part of a meeting package.
11. **Create Invoice Items for Package Types.** Creates invoice items for meeting package types.
12. **For Each MP Item.** Creates invoice items for meeting function items or nonfunction line items.
13. **Create Invoice Tax Items.** Creates taxes and service charges for newly created invoice items.
14. **Uncheck Refresh Flag.** Clears the Refresh flag of the event check that is being posted.
15. **Update Invoice Status.** Assigns a Status of Posted to the event check that is being posted.
16. **Query for event checks.** Queries for other open event checks for the same order as that of the current event check.
17. **Other Event Checks Exist?** Checks whether or not any other open event checks are available.
18. **UnFreeze Order.** Unlocks the event order to so that the Status of the order can be set to Closed.
19. **Update Order Status.** Assigns a Status of Closed to the event order.
20. **Freeze Order.** Locks the event order.
21. **Is Post Day?** If the workflow is invoked by the Post Day functionality, then this step prevents the invoice details from being refreshed by ending the workflow.

22. **Refresh Invoice Business Component.** Refreshes the invoice business component.

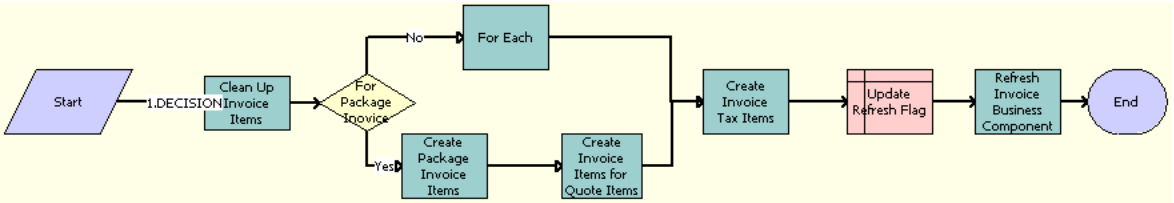
Associated Business Service Methods. The following table shows the steps in this workflow that call business service methods.

Workflow Step	Method Called	In Business Service
Have All MP Functions Started	Have All Functions Started	SHM Invoice Process
Have All Functions Started	Have All Functions Started	SHM Invoice Process
Clean Up Invoice Items	Clean Up Invoice Items	SHM Invoice Process
For Each	Accumulate	SH For
Create Invoice Items for Package Types	Create Package Type Invoice Items	SHM Invoice Process
For Each MP Item	Accumulate	SH For
Create Invoice Tax Items	Create Invoice Tax Items	SHM Invoice Process
Update Invoice Status	Set Status	SHM Invoice Process
UnFreeze order	FreezeReviseOrderForPostCheck	TNT SHM Order Service
Update Order Status	Set Order Status	SHM Invoice Process
Freeze order	FreezeReviseOrderForPostCheck	TNT SHM Order Service
Refresh Invoice Business Component	Refresh Business Component	SIS OM PMT Service

SHM Recalculate Invoice Items Workflow

This workflow process is called when a user clicks a Recalculate button. This workflow process re-creates the current event check.

The following image shows this workflow.



Workflow Description. This workflow performs the following actions:

1. **Clean Up Invoice Items.** Deletes the invoice items.
2. **For Package Invoice.** Decides whether or not to re-create invoice items for order function items or meeting function items.
3. **For Each.** Creates invoice items only for order function items that are not part of a meeting package.
4. **Create Package Invoice Items.** Creates invoice items for meeting package types.
5. **Create Invoice Items for Quote Items.** Creates invoice items for meeting function items or nonfunction line items.
6. **Create Invoice Tax Items.** Creates taxes and service charges for newly created invoice items.
7. **Update Refresh Flag.** Clears the Refresh flag in the invoice from which this event check was generated.
8. **Refresh Invoice Business Component.** Refreshes the invoice business component.

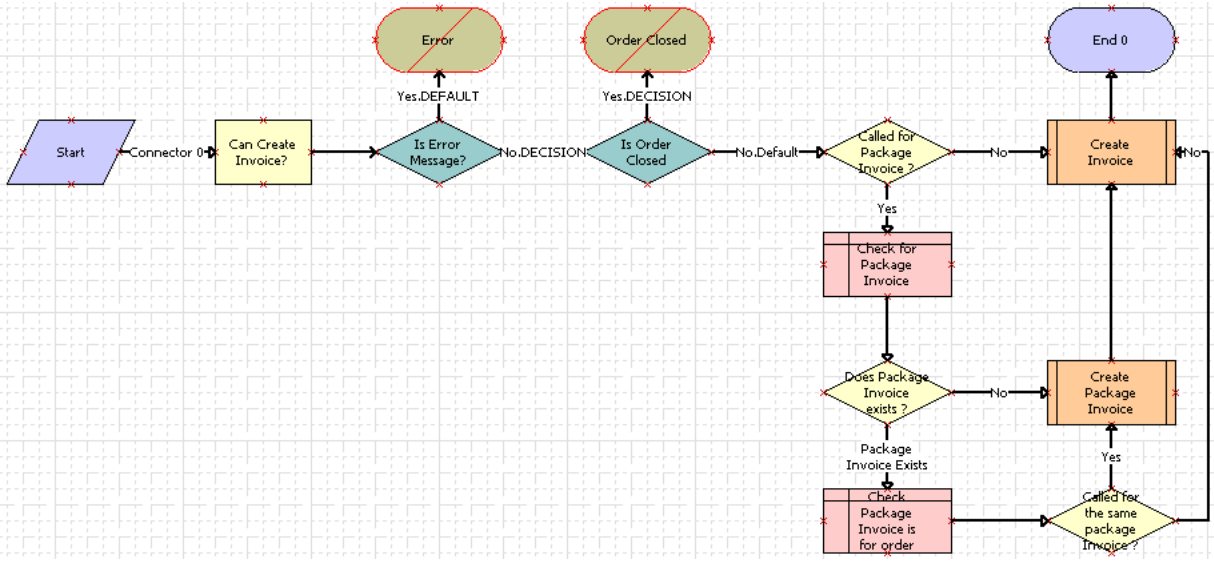
Associated Business Service Methods. The following table shows the steps in this workflow that call business service methods.

Workflow Step	Method Called	In Business Service
Clean Up Invoice Items	Clean Up Invoice Items	SHM Invoice Process
For Each	Accumulate	SH For
Create Package Invoice Items	Create Package Type Invoice Items	SHM Invoice Process
Create Invoice Items for Quote Items	Accumulate	SH For
Create Invoice Tax Items	Create Invoice Tax Items	SHM Invoice Process
Refresh Invoice Business Component	Refresh Business Component	SIS OM PMT Service

TNT Wrapper Trial_Open Check Workflow

This workflow process is called when a user clicks either the Open Check/Trial Check button or the Open Day button. This workflow process creates an event check with a Status of Open or Trial, depending on which button is clicked, by calling the SHM Trial_Open Check Workflow.

The following image shows this workflow.



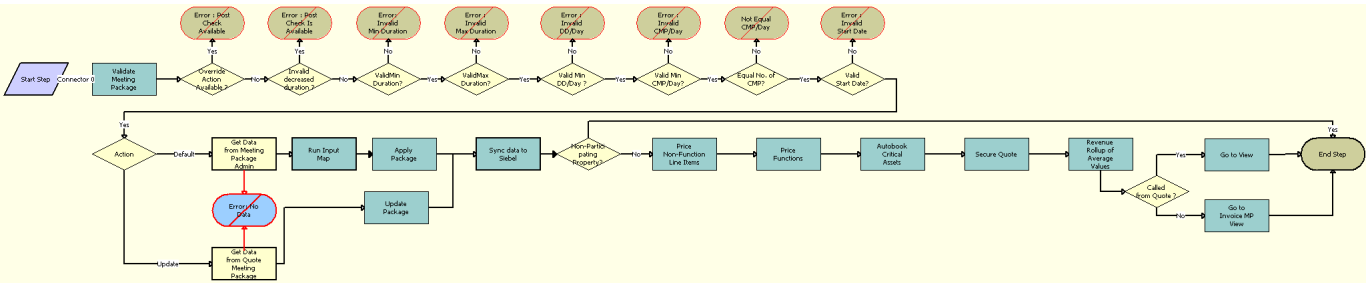
Workflow Description. This workflow performs the following actions:

1. **Can Create Invoice?** If the order Status is Event Check, then this step stops the workflow.
2. **Is Error Message?** If an error message is generated, then this step stops the workflow.
3. **Is Order Closed.** If the order is closed, then this step stops the workflow.
4. **Called for Package Invoice?** Decides whether to create a meeting package event check or a non-meeting package event check.
5. **Create Invoice.** Creates a non-meeting package event check.
6. **Does Package Invoice exists?** Checks whether or not a meeting package event check is already available.
7. **Create Invoice.** Creates a meeting package event check.
8. **Check Package Invoice is for order.** Checks whether or not an available meeting package event check is being created for the current order.
9. **Called for the same package Invoice?** Decides whether or not to create a meeting package event check for the current order.

TNT Apply Package Workflow

This workflow process is called when a user clicks the Apply Package button in the Quote screen, Meeting Packages view or in the Event Checks screen, Meeting Packages view. This workflow process creates the functions, nonfunction line items, and room blocks of the selected meeting package in the current quote or event check.

The following image shows this workflow.



Workflow Description. This workflow performs the following actions:

1. **Validate Meeting Package.** This step runs the validation criteria in the following substeps.

a. **Override Action Available?** Decides whether or not the Override action is available.
b. **Invalid decreased duration?** Decides whether or not the Duration of the meeting package can be decreased or not.
c. **ValidMin Duration?** Decides whether or not the Duration meets the minimum duration of the meeting package.
d. **ValidMax Duration?** Decides whether or not the Duration exceeds the maximum duration of the meeting package.
e. **Valid Min DD/Day?** Decides whether or not the number of day delegate attendees meets the minimum number of day delegates specified in the meeting package.
f. **Equal No. of CMP?** Validates whether or not the Min Duration is equal to the Max Duration in the meeting package administration record, and then validates whether or not the number of CMPs for each room are the same for each day.
g. **Valid Min CMP/Day?** Validates whether or not the number of CMP attendees in the quote meets the minimum attendees specified in the meeting package.
h. **Valid Start Date?** Validates whether or not the meeting package dates in the quote are correct, and whether or not the meeting package is available on those days.

2. **Action.** Checks whether to apply the meeting package to the quote for the first time, or to update the components of a meeting package that already exists in the quote.
3. **Get Data from Quote Meeting Package.** Obtains the details of the applied meeting package from the quote.
4. **Update Package.** Runs a business service method to prepare the property set that is required to update the existing components of an applied meeting package in the quote.
5. **Get Data from Meeting Package Admin.** Obtains the details of the meeting package from the meeting package administration record.
6. **Run Input Map.** Runs an input-output process to get the meeting package details from meeting package administration record.
7. **Apply Package.** Runs a business service method to prepare the property set that is required to create the meeting package components in the quote.
8. **Sync data to Siebel.** Runs an input-output process to create and update the meeting package components in the quote or event check.
9. **Non-Participating Property?** Checks whether or not the selected quote is associated with a nonparticipating property.
10. **Price Non-Function Line Items.** Reprices all nonfunction line items in the current meeting package.
11. **Price Functions.** Reprices all functions in the current meeting package.
12. **Autobook Critical Assets.** Runs a business service method to autobook all the critical line items that accompany the meeting package.
13. **Secure Quote.** Calls a business service method to perform the following tasks:
    - Reserve, refresh, and reprice the functions
    - Reserve and reprice the room blocks
14. **Revenue Rollup of Average Values.** Runs a business service method to update the revenue calculations in the quote.
15. **Called from Quote?** Differentiates whether or not the workflow is called from quote or from an event check.
16. **Go to View.** Navigates to the Meeting Packages view in the Quote screen.
17. **Go to Invoice MP View.** Navigates to the Meeting Packages view in the Event Checks screen.

Associated Business Service Methods. The following table shows the steps in this workflow that call business service methods.

Workflow Step	Method Called	In Business Service
Validate Meeting Package	ValidateApplyPkg	TNT Apply Package Service
Get Data from Meeting Package Admin	Query	EAI Siebel Adapter
Get Data from Quote Meeting Package	Query	EAI Siebel Adapter
Run Input Map	Execute	EAI Data Transformation Engine
Apply Package	ApplyPackage	TNT Apply Package Service
Update Package	UpdatePackage	TNT Apply Package Service
Sync data to Siebel	Execute	EAI Siebel Adapter
Price Non-Function Line Items	LineItemRepriceAll	TNT SHM Function Revenue Service
Price Functions	FnRepriceAll	TNT SHM Function Revenue Service
Autobook Critical Assets	Quote Book	TNT SHM Asset Service
Secure Quote	SecureQuote	TNT Apply Package Service
Revenue Rollup of Average Values	RefreshAllFunctions	TNT SHM Function Revenue Service
Go to View	GotoView	RefreshAllFunctions
Go to Invoice MP View	GotoView	RefreshAllFunctions

30 Managing Hospitality Reports

Managing Hospitality Reports

This chapter describes the administrator and end-user procedures for managing BI Publisher reports in Siebel Hospitality. It includes the following topics:

- *About Hospitality Reports*
- *Roadmap for Administering Hospitality Reports*
- *Process of Converting the Banquet Event Order Report to a 12-Hour Format*
- *Process of Generating Hospitality Reports*
- *Hospitality Reports Reference*

About Hospitality Reports

You can run and print multiple types of reports on information in Siebel Hospitality by using an embedded third-party technology, Oracle® Business Intelligence Publisher (Oracle BI Publisher).

By updating report templates, you can modify Hospitality reports that are specific to your property. Some examples are the logos that are displayed; and hotel policies such as guarantees, contractual language, tax requirements, and service charge guidelines that can be included. Siebel application reports are configurable in Oracle BI Publisher, which is an add-in to Microsoft Word. Therefore, you can make changes to the reports in Microsoft Word.

You can run Hospitality reports in various formats such as RTF, HTML, XLS, and so on. This enables you to manually modify reports as needed, and to be flexible in sharing and printing report contents.

For more information about setting up and managing reports, see *Siebel Reports Guide* .

Roadmap for Administering Hospitality Reports

This topic lists the processes and tasks that administrators typically perform to administer Hospitality reports. Your company might follow a different process according to its business requirements.

To administer Hospitality reports, perform the following processes and tasks:

1. *Configuring Headers for Hospitality Reports*
2. *Associating Logos with Hospitality Reports*
3. *Setting Up Text for Taxes and Service Charges*
4. *Configuring Fields for Hospitality Reports*
5. *Process of Converting the Banquet Event Order Report to a 12-Hour Format*

Configuring Headers for Hospitality Reports

Before users can generate a Hospitality report, administrators must configure the report headers. Report headers that are associated with line items, that contain generic comments, or that contain function-specific comments can appear in a report.

This task is a step in *Roadmap for Administering Hospitality Reports*.

This topic includes the following topics:

- *Creating Global Report Headers*
- *Setting Up Report Headers for a Property*
- *Setting Up Report Headers for Property-Specific Products*
- *Setting Up Report Headers for Non-Property-Specific Products*

Creating Global Report Headers

Although Siebel Hospitality includes multiple global report headers, administrators can create additional global report headers. Administrators can then associate these headers with properties and products so that users can associate these report headers with the line items that appear in Hospitality reports.

To create a global report header

1. Navigate to the Report Headers screen.
2. In the Report Headers list, create a new record.

Setting Up Report Headers for a Property

Administrators can associate a global report header with any property. Siebel Hospitality includes multiple global report headers. If the global report header that you want to associate with a property is not set up in Siebel Hospitality, you can associate a property-specific report header with the property. In this case, you can change the name of the property-specific report header to another name that accommodates your business needs.

Administrators can also create generic comments for property-specific report headers. Users can include these comments in a report, exclude these comments from a report, or add new comments to a report.

To set up a report header for a property

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the property to associate with a report header.
3. Drill down on the link in the Property Name field.
4. Click the Report Headers view tab.
5. In the Report Headers list, create a new record.

   The following table describes some of the fields.

Field	Comments
Report Header	Select a value for the report header. You create the available values in the Report Headers screen. For more information, see *Creating Global Report Headers*.

Field	Comments
Label	Enter the report header name to appear in the generated report. Use this field to customize the label for the global report header.
BEO Sequence	Select a number that determines the order in which the report header appears in the report. For example, if you select 1, the report header appears as the first header in the report.

6. To create generic comments for the property-specific report header, complete the following steps for each comment you add:
    a. Scroll down to the Comments list, and create a new record.
    b. In the Sequence field, select a number that determines the sequence in which the comment text appears in the dialog box that Siebel Hospitality displays when users add comments to the report.
    c. In the Comments field, enter a description.
    d. (Optional) To check the comment text for spelling errors, click the Check Spelling button.

Setting Up Report Headers for Property-Specific Products

After administrators set up property-specific report headers, they can associate those report headers with the products assigned to the properties that use those report headers.

To set up a report header for a property-specific product

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the property associated with the product for which to set up a report header.
3. Click the link in the Property Name field.
4. Depending on the product for which you want to set up a report header, click one of the following view tabs:
    - Event Order/Menu Items
    - Menus
    - Packages
5. In the list of products, query for and select the product to associate with a report header.
6. In the Report Header field, click the select button, and select the report header.

    If more than one value is available, you can select multiple values. The value in the Property field for the product determines the values that you can select in the Report Header field.

Setting Up Report Headers for Non-Property-Specific Products

Administrators can associate any global report header with the products that are not assigned to any property.

To set up a report header for a non-property-specific product

1. Navigate to the Administration - Product screen, then the Products view.
2. In the Products list, query for and select the product to associate with a report header.
3. In the Report Header field, click the select button, and select the report header.

If more than one value is available, you can select multiple values. The value in the Property field for the product determines the values that you can select in the Report Header field.

Associating Logos with Hospitality Reports

Administrators can associate a logo with a property. When users generate a report for the property, the associated logo appears at the start of each page in the report.

This task is a step in *Roadmap for Administering Hospitality Reports*.

To associate a logo with a Banquet Event Order report

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the property to associate with a logo.
3. In the Report Logo field, click the select button, select the appropriate URL in the Pick Report Logo dialog box, and click OK.

   You can also add a new URL in the Pick Report Logo dialog box.

Setting Up Text for Taxes and Service Charges

Administrators can set up text that relates to taxes and service charges for a property. This text will appear on Banquet Event Order (BEO) reports. When a user generates a BEO report for the property, this text appears at the end of the report.

This task is a step in *Roadmap for Administering Hospitality Reports*.

To set up text for taxes and service charges

1. Navigate to the Property Administration screen, then the Properties view.
2. In the Properties list, query for and select the property for which you want to set up text for taxes and service charges.
3. Drill down on the link in the Property Name field.
4. Click the Reporting Preferences view tab.
5. Enter text in the Tax and Service Charge Text field.

Configuring Fields for Hospitality Reports

Administrators can modify field formats and modify field mapping for Hospitality reports. When users generate a report using the modified fields, the new formats appear in the report. For information about preconfigured fields, see the information about report fields in the topics under *Hospitality Reports Reference*.

This task is a step in *Roadmap for Administering Hospitality Reports*.

This topic includes the following topics:

- *Modifying Formats and Mappings for Hospitality Report Fields*

- *Mapping New Fields for Hospitality Reports*

Modifying Formats and Mappings for Hospitality Report Fields

Administrators can modify formats for any report field. This topic describes how to modify field mappings and how to format fields for Hospitality reports.

To modify formats and mappings for Hospitality report fields

1. Modify the report RTF file by completing the following steps.
    a. Navigate to the file in the following directory:

    ```
    $SiebelRoot$\XMLP\Templates
    ```
    b. Select and open the RTF file for the report whose field mappings to modify.
    c. Make the necessary field mapping and formatting modifications to the file.
    d. Save the file.
2. Generate a report XLF file from the report RTF file by completing the following steps.
    a. Open the report RTF file.
    b. Navigate to Oracle BI Publisher, Translate Template, and then Extract Text.

    > **Note:** You can access Oracle BI Publisher only if you install Business Intelligence Desktop, a Business Intelligence Add-in for Microsoft Word.

    c. Save the report RTF file as a XLF file in the following directory:

    ```
    $SiebelRoot$\XMLP\XLIFF\Language .
    ```

    For more information about modifying reports templates and Oracle BI Publisher Add-in for Microsoft Word, see *Siebel Reports Guide* .
3. In Siebel Hospitality, navigate to the Administration - BIP Reports screen, then the Report Template Registration view.
4. In the Report Template Registration list, complete the following steps.
    a. Query for and select the report with the Report Name field value of the report title.
    b. In the Template field, click the select button, navigate to the report RTF file and click Add.
    c. In the XLIFF field, click the select button, navigate to the report XLF file and click Add.
    d. Click Upload Files.

Mapping New Fields for Hospitality Reports

Administrators can add new fields to Hospitality reports. This topics describes how to add and synchronize fields to Hospitality reports.

To map new fields for a Hospitality report

1. In Oracle's Siebel Tools, add the fields in the required business component.
2. Synchronize the report integration object.

    For more information about synchronizing integration objects, see *Integration Platform Technologies: Siebel Enterprise Application Integration* .
3. Configure the field formats.

For more information about configuring the field formats, see *Modifying Formats and Mappings for Hospitality Report Fields*.

Process of Converting the Banquet Event Order Report to a 12-Hour Format

By default, the Banquet Event Order Report displays time values in a 24-hour format. For example, the report shows one hour past noon as 13:00. Optionally, you can configure the report to display time values in a 12-hour format. In this case, for example, the report shows one hour past noon as 1:00 PM.

This topic lists the tasks that administrators typically perform to configure the Banquet Event Order Report to display time values in a 12-hour format. Your company might follow a different process according to its business requirements.

To configure the Banquet Event Order Report to display time in a 12-hour format, perform the following tasks:

1. *Downloading the Banquet Event Order Report Template*
2. *Configuring the Banquet Event Order Report Template*
3. *Uploading the Modified Banquet Event Order Report Template*
4. *Configuring the STHeader Calculated Field*

This process is a step in *Roadmap for Administering Hospitality Reports*.

Downloading the Banquet Event Order Report Template

Use this procedure to download the Banquet Event Order Report template file to your computer, where you can configure it in Microsoft Word.

This task is a step in *Process of Converting the Banquet Event Order Report to a 12-Hour Format*.

To download the Banquet Event Order Report template

1. Log in to Siebel Hospitality.
2. Navigate to Administration - BI Publisher Reports, then the Reports - Standard Templates view.
3. In the Reports - Standard Templates list, find the template with the Report Name of Event Order Report.
4. In the Template field of the Event Order Report record, click the TNT_BEO link.
5. Save the TNT_BEO.rtf file to your local computer, keeping the same file name.

Configuring the Banquet Event Order Report Template

Use this procedure to modify the sections in the Banquet Event Order Report template that control the display of function times in the report. The modifications change the time display from a 24-hour format to a 12-hour format in specific parts of the report.

Note: To perform this task, you must have Oracle BI Publisher Desktop and Microsoft Word installed.

This task is a step in *Process of Converting the Banquet Event Order Report to a 12-Hour Format*.

To configure the Banquet Event Order Report template

1. Start Microsoft Word and open the TNT_BEO.rtf file.
2. In the application menu bar, choose Oracle BI Publisher, then choose Field Browser.

   The Field Browser pop-up window opens. This window shows the code for the fields of the template.
3. In the Field Browser pop-up window, click Show All.
4. Change the display of function times by performing the following steps.

   a. In the Find field at the start of the window, enter Stime and click Find Next.

      The Stime character string appears in the For Each Function section of the template code. This section controls the display of the function details such as name, type, time, and so on. The line that contains STime and the next line appear as follows:

      ```
      <?STime?>
      <?xdofx:if ETime!='' then ' - '||ETime end if?>
      ```

   b. Select the line with STime, and in the Edit box at the end of the screen, replace STime with STimeCalc and click Update.

      The line now appears as follows:

      ```
      <?STimeCalc?>
      ```

   c. Select the next line, and in the Edit box, replace each of the two occurrences of ETime with ETimeCalc and click Update.

      The line now appears as follows:

      ```
      <?xdofx:if ETimeCalc!='' then ' - '||ETimeCalc end if?>
      ```

5. Change the display of order item times by performing the following steps.

   a. In the Find field at the start of the window, enter BEOSTET and click Find Next.

      Two instances of the BEOSTET character string appear in the Report Header section. This section groups the order items by report header and displays the function times with the items. Each line that contains BEOSTET appears as follows:

      ```
      <?../../ListOfTNTSHMFunction_BEOOrderItem/
      TNTSHMFunction_BEOOrderItem[xdoxslt:get_variable($_XDOCTX, 'Count2')]/
      BEOSTET?>'
      ```

   b. Select each line that contains BEOSTET, and in the Edit box, replace BEOSTET with RHLFST and click Update.

      The lines now appear as follows:

      ```
      <?../../ListOfTNTSHMFunction_BEOOrderItem/
      TNTSHMFunction_BEOOrderItem[xdoxslt:get_variable($_XDOCTX, 'Count2')]/RHLFST?>'
      ```

6. Click Close to close the Field Browser pop-up window.
7. Save and close TNT_BEO.rtf.

Uploading the Modified Banquet Event Order Report Template

To upload the TNT_BEO.rtf template file back into Siebel Hospitality after you have modified it, follow this procedure.

This task is a step in *Process of Converting the Banquet Event Order Report to a 12-Hour Format*.

To upload the modified Banquet Event Order Report template

1. Log in to Siebel Hospitality.
2. Navigate to Administration - BI Publisher Reports, then the Reports - Standard Templates view.
3. In the Reports - Standard Templates list, find the template with the Report Name of Event Order Report.
4. Select the Template field of the Event Order Report record and click the select button.
5. In the Add Attachment dialog box, navigate to the location on your computer where the TNT_BEO.rtf file is saved, select the file, and click Add.
6. In the Reports - Standard Templates view, click Upload Files.

Configuring the STHeader Calculated Field

STHeader is a calculated text field in the Banquet Event Order Report. STHeader combines the Service Start Time, Function Type, and Function Space or Location field values from your Siebel application. In STHeader, by default, StartTimeRep is the Function Time field in 24-hour format (00:00 to 23:59). You can replace StartTimeRep with SSTimeCalc, which is the Function Time field in 12-hour format (00:00 AM to 11:59 PM). SSTimeCalc identifies pre-noon times as AM and post-noon times as PM in all languages.

To replace the 24-hour time value display in STHeader with a 12-hour time display, follow this procedure.

This task is a step in *Process of Converting the Banquet Event Order Report to a 12-Hour Format*.

To configure the STHeader calculated field

1. Open Siebel Tools.
2. In the Object Explorer, select Business Component and query for TNT SHM Order Item.
3. In the TNT SHM Order Item business component, query for the STHeader field.

   The calculated value field appears as follows:

   ```
   '[Start Time Rep] + IIf ([Function Type] IS NOT NULL, ' '+[Function Type],'') +
   IIf ([RFS] IS NOT NULL , ' '+[RFS], '')'
   ```

4. In the calculated value field, replace [Start Time Rep] with [SSTimeCalc].

   The value now appears as follows:

   ```
   '[SSTimeCalc] + IIf ([Function Type] IS NOT NULL, ' '+[Function Type],'') + IIf
   ([RFS] IS NOT NULL , ' '+[RFS], '')'
   ```

5. Compile the TNT SHM Order Item business component to the SRF file.

Process of Generating Hospitality Reports

This topic lists the tasks that users typically perform to generate Hospitality reports. Your company might follow a different process according to its business requirements.

To create Hospitality reports, perform the following tasks:

1. *Adding Generic Comments to Event Report Headers*
2. *Adding Function-Specific Comments to Quote and Order Report Headers*
3. *Generating Hospitality Reports*

Adding Generic Comments to Event Report Headers

Before generating an event report, users can add generic comments to event report headers. For the property-specific report headers in the Event Order Specifications view, users can select the generic comments that administrators set up. Users can also create new generic comments.

All report headers that are associated with the property for the event order will appear in the Report Headers list in the Event Order Specifications view. However, when you generate the report, only the report headers that are associated with line items or comments appear in the report.

This task is a step in *Process of Generating Hospitality Reports*.

To add a generic comment to an event report header

1. Navigate to the Orders screen, then the Event Order view.
2. In the Event Orders list, query for and select the event order.
3. Drill down on the link the Order number (#) field.
4. Click the Event Order Specifications view tab.

   The Report Headers list shows the property-specific report headers for the event order, and the Function Report Header Comments list shows the function-specific comments for the event order. For information about creating function-specific comments, see *Adding Function-Specific Comments to Quote and Order Report Headers*.
5. In the Event Order Specification view, complete the following steps:

   a. In the Report Headers list, select the appropriate report header.
   b. In the Comments list, create a new record, and complete either of the following steps:

      - Click the select button in the Comments field, select a comment in the dialog box that appears, and click OK.
      - Enter a new comment in the Comments field.

   c. In the Sequence field, select a number that determines the sequence in which the comment text appears in the report header.

      Although the Sequence field is automatically populated, you can change this field value.
   d. (Optional) To check the comment text for spelling errors, click the Check Spelling button.

Adding Function-Specific Comments to Quote and Order Report Headers

Before generating a quote or order report, users can add function-specific comments to quote report and order report headers. For the functions in the Functions view of an order or quote, users can select function-specific comments for property-specific report headers. Administrators set up as generic comments the function-specific comments that users can select. Users can also create new function-specific comments.

This task is a step in *Process of Generating Hospitality Reports*.

To add a function-specific comment to a quote or order report header

1. Navigate to one of the following screens and views.
    - Orders screen, then the Event Order view
    - Quotes screen, then the List view
2. In the list, query for and select the order or quote record.
3. Drill down on one of the following links.
    - In the Orders screen, Event Order view, drill down on the Order number (#) field.
    - In the Quotes screen, List view, drill down on the Name field.
4. Click the Functions view tab.
5. In the Functions list, select the appropriate function, and then click the Report Headers view tab after the Functions list.
6. In the Report Headers view, complete the following steps.
    a. In the Report Headers list, create a new record, click the select button in the Report Header field, select a property-specific report header in the dialog box that appears, and click OK.

       You can select only the property-specific report headers that administrators set up for the property on the event order or quote.
    b. In the Comments list, create a new record, and complete either of the following steps:
        - Click the select button in the Comments field, select a comment in the dialog box that appears, and click OK.
        - Enter a new comment in the Comments field.
    c. In the Sequence field, select a number that determines the sequence in which the comment text appears in the report header.

       Although the Sequence field is automatically populated, you can change this field value.
    d. (Optional) To check the comment text for spelling errors, click the Check Spelling button.

Generating Hospitality Reports

Users can follow the procedure in this topic to generate any Hospitality BI Publisher report. You can generate reports from the views of multiple screens. For the screens in which specific reports are available, see the individual report descriptions under *Hospitality Reports Reference*.

This task is a step in *Process of Generating Hospitality Reports*.

To generate a Hospitality report

1. Navigate to the screen and view from which to run the report.
2. Query for the records for which to run the report to limit the size of the report.

   A report that you run includes all the records displayed in the current view.
3. In the Siebel application toolbar, click the Reports button.

   A drop-down menu lists the reports that are available for the current screen and view.
4. In the BI Publisher section of the menu, select the report to run.

   A dialog box displays a ReportOutputType row for the selected report.
5. In the Pick List Values field, select a file format for the report.
6. Click Submit.

   Siebel Hospitality generates the report, and a File Download dialog box appears prompting you to open or save the report. HTML reports appear in a new browser window, while reports generated in other formats appear in separate application windows.

Hospitality Reports Reference

This topic contains descriptions and details of specific Hospitality reports. The following reports are included in this topic:

- *Account Profile Report*
- *Accounting Event Check Report*
- *Banquet Event Order Report*
- *Events Report*
- *Guest Event Check Report*
- *Pro Forma Event Check Report*
- *Resume Report*

Account Profile Report

This topic describes the Account Profile Report for Siebel Hospitality.

About the Account Profile Report

To *profile* an account is to research and analyze that account and the contacts associated with the account. The purpose of profiling is to determine whether the account exists in your Siebel Hospitality database, and to learn the details of that account.

The Account Profile Report is a detailed overview of an account. This report contains general account information, a detailed account profile, a travel profile, a financial overview, and lists of initiatives and contacts.

The Account Profile Report can be used by sales, revenue management, and event management personnel to view the account profile, business profile, and financial overview of an account. The Account Profile Report is used by account managers to research account information including financial, historical, credit card usage, travel agency usage, and related data. Account managers can use this information to determine rates for future bookings, potential discounts, and so on.

The Account Profile Report is available in views of the Accounts screen.

Fields in the Account Profile Report

Some fields in the Account Profile Report are listed in the following table.

Report Field	Comments
Activity in Market	Indicates any activity in the market relevant to the company.
BT Buying Decision	Indicates any policies that the account uses to make business transient (BT) buying decisions. For example, transient reservations might be made through a travel planner.
Compelling Events & Important Issues	Indicates key events for this account that could generate specific business opportunities.
Competitive Set Spending	Amount of money spent at the competitive set of the property. *Competitive set* refers to all other properties that are in competition with your property for the business of the account.
Complexity Rating	A rating for how complex the quote was to create and develop.
Compliance Percentage	Indicates the percentage of employees associated with the account who follow the company travel policies of the account. A high number means that most employees follow the company travel policies closely.
Extended Stay in Directory	Indicates whether or not extended stay rates for a number of properties are defined for the account. These rates are listed in a directory format.
Max Rate Increase/Market	The maximum rate or increase that the account will accept according to the market and year by year.
Max # of Blackout Dates	Indicates the maximum number of times that the special rates can be restricted within one year.
National Account	Indicates whether the account is a national account (Y) or a local account (N).
Ownership Type	Indicates whether the account is a publicly or privately owned company.

Report Field	Comments
Preferred Program	Indicates whether or not the competitor is part of the Competitor Preferred Program.
Rate	The rate that this competitor offered to the account.
Rates Listed in Directory	Indicates whether or not special rates for a number of properties are available to the account. These rates are listed in a directory format.
Requires LRA (Last Room Availability)	Indicates that the account must receive its usual rate until the last room at the property has been sold, regardless of hotel occupancy.
Room Change Percentage	The projected percentage change in room nights booked between the current year and the previous year.
Share Percentage	The percentage spent at this property as compared to all other properties that the account uses.
Travel & Entertainment Spend	The total amount that the account is expected to spend on travel and entertainment this year.
Value Rating	The rating for the value of the quote.

Accounting Event Check Report

This topic describes the Accounting Event Check Report for Siebel Hospitality.

About the Accounting Event Check Report

An *event check* is an invoice for an event. An accounting event check is generated for the accounting department of the property that hosted the event. For more information about event checks, see *Generating Event Checks*.

Event managers create the Accounting Event Check report from information in the Event Check record that is used by the accounting department of the property. The report reflects the line item records listed on the Event Checks Screen, Line Items (Accounting) view, which are transformed into an accounting version. The Accounting Event Check report displays the billable line items separated by their allocations of revenue categories for accounting and accounting downstream systems.

Siebel Hospitality can display and print several event check report views, as follows:

- **Accounting View**. This is the Accounting Event Check report. This report shows all line items broken down and categorized so all revenues can be tracked against the proper revenue buckets. This report is used internally and not shared with the guest, because every line item is broken down and guests rarely need this level of detail.
- **Guest View**. This is the Guest Event Check report. This report shows the charges that are relevant to the guest. This report lists the customer charges for all applicable items. For more information about the guest view, see *Guest Event Check Report*.

- **Guest summary**. This is the Pro Forma Event Check report. This report shows the charges that are relevant to the guest. This report lists the items for all event checks associated with a specific quote. For more information, see *Pro Forma Event Check Report*.

In other words, the Guest Event Check report shows the item charges associated with an event, while the Accounting Event Check report shows these items plus the line details that make up each one. For example, if a guest buys a package priced at 1000.00, then the Guest Event Check report shows a 1000.00 package. However, in the corresponding Accounting Event Check report, that 1000.00 is split among the components of the package.

If the Accounting Event Check report is for a package event check, then the report includes a Meeting Package section that displays the meeting package event check, then the report includes a Meeting Package section and an Accommodation section. The Meeting Package section displays the price of each meeting package as 0. In sections other than the Meeting Package section, if a line item is part of a meeting package, then the price of that line item is displayed.

The Accounting Event Check Report is available in views of the Event Checks screen.

Fields in the Accounting Event Check Report

Some fields in the Accounting Event Check Report are listed in the following table.

Report Field	Comments
Business Type	The type of business of the customer organization. Choices are group and local.
Ext Qty	The extended quantity of the item needed for the function. In a hierarchical line item, the extended quantity of a child item is calculated as the quantity of the item multiplied by the quantity of the root item.
Folio #	The number assigned to the folio.
Meeting Package Display Name	If this report is for a package event check, this field displays a list of the names of meeting packages on the event check.
Pkg Type-Occ	Meeting package occupancy type, for example, Standard King-Single.
Status	The status of the event check.
Tax / SC Inclusive	Indicates whether tax and service charge are included in the price.
Total Price	The unit price of an item multiplied by the quantity of the item.
Unit Price	The total price of an item divided by the extended quantity of the item.

Banquet Event Order Report

This topic describes the Banquet Event Order Report for Siebel Hospitality.

About the Banquet Event Order Report

A *Banquet Event Order* is a contractual agreement between the meeting professional and a hotel. This agreement expresses the objectives and details of one or more functions.

The Banquet Event Order (BEO) Report displays functions and subfunctions that take place for an event and shows the details of those functions and subfunctions. This report provides the operation execution team with detailed information about food, beverages, and setup requirements for all functions in an order. The BEO Report helps provide consistency in internal and external communications in the hotel industry. However, contractual terms and agreements might differ between properties.

The first section of a BEO Report provides administrative information about the property, the account, the customer contact, and event order details.

Event managers can generate and print a Banquet Event Order (BEO) Report before an event occurs.

The line items on the report appear according to the following rules:

- Functions are listed by date and start time.
- Function line items for a function are listed by service start time.
- Menu line items appear before other function line items.
- The report headers that administrators configure using the procedures in *Configuring Headers for Hospitality Reports* appear in the report if the report headers are associated with the line items or comments.

If a function agenda contains a parent function record that is used for detailing or a space hold (that is, if the Detail flag of a function record is selected), the parent record does not appear in the BEO Report. The BEO Report shows *only* the subfunctions and grandchild functions of a detailing record or space hold record. The detailing or space hold record is not an actual function; it is used only to hold space. For more information about detailing, see *Detailing a Function*. For more information about space holds, see *About Space Holds*.

The subfunctions and grandchild functions represent the actual functions and subfunctions, respectively. Report formatting and functionality for the subfunctions and grandchild functions is the same as if these were functions and subfunctions.

The Banquet Event Order Report is available in the Event Order views of the Orders screen.

Fields in the Banquet Event Order Report

Some fields in the BEO Report are listed in the following table.

Report Field	Comments
*	An asterisk (*) appears before the comment for a generic header when the Comment Last Updated Date field value is later than the Order or Track Event Order Changes Date fields.
Event Order #	The number assigned to the event order.

Report Field	Comments
Exp	The number of expected attendees for the function.
Folio #	The number assigned to the folio.
Gtd	The number of guaranteed attendees for the function.
Included in [Mtg Pkg Display Name]	Displayed only if an item is part of a meeting package.
Included in [Package Display Name]	A header if a line item is part of a package. • This field appears in the report header section when a line item is part of a package, and the value assigned to the Report Header field of the line item is not the same as the value assigned to the Report Header of the Package field. • This field appears in the menu items section when a line item is part of the Package Each field or a Package Per Person field.
Menu Unit Net Price	The net unit price of the menu. If a line item is part of a meeting package, displays 0.
Package Display Name	The display name of the package.
Package Qty	The quantity of this package that is ordered.
Post As	A more descriptive name than the quote name. This is usually the name of the event as posted on the reader boards at the hotel. **Note:** If the Post As field value is not defined, the Quote Name field value is used.
Room Rental	The negotiated price of the function space line item. If a negotiated price for line item is not defined, this field value is the list price value. The value comes from the Event Order screen, Function view, Line Items subview. If the function is part of a meeting package, displays the name of the meeting package.
Service Start Time	The service time for the line item. This field appears only when the value assigned to the Service Start field is not the same as the value assigned to the Function Start field.
Set	The number of places set for the function.
Split Line Item Unit Net Price	If a line item is part of a meeting package, displays 0.
Unit Net Price	If a line item is part of a meeting package, displays 0.

Events Report

This topic describes the Events Report for Siebel Hospitality.

About the Events Report

The Events Reports shows a summary of all groups, local bookings, and in-house bookings that hold function spaces on a specific day and week. The Events Report is used by internal teams and might also be shared with the customer.

The Events Report is available in views of the Quotes screen.

Fields in the Events Report

Some fields in the Events Report are listed in the following table.

Report Field	Comments
EXP/GTD/SET	Expected, Guaranteed, and Set field values from the functions associated with a quote. If the function is detailed, these values are not displayed for the parent function on the report.
POST AS: Quote Post As	If Post As is null, this field displays the Quote Name value. Otherwise, this field displays the Quote Post As value.
Folio #	Primary Folio #
Master Acct Payment	Payment method for the event.
Post As	A more descriptive name than the quote name. This is usually the name of the event as posted on the reader boards at the hotel. **Note:** If the Post As field value is not defined, the Quote Name field value is used.
Definite Cover	The number of attendees that are considered definite for the event.
Definite Revenue	The amount of revenue that is expected for the event, calculated from the number of definite attendees.

Guest Event Check Report

This topic describes the Guest Event Check Report for Siebel Hospitality.

About the Guest Event Check Report

An *event check* is an invoice for an event. A guest event check is generated for the customer for which the event was hosted. For more information about event checks, see *Generating Event Checks*.

During the Event Check process, event managers can create reports from information in the Event Check record. The Guest Event Check report reflects the line item records in the Event Checks Screen, Line Items (Guest) view, which are transformed into the customer version of the Event Checks Report used by the accounting department. The Guest Event Check report functions as a customer invoice that tracks billing information associated with an order.

The Guest Event Check Report displays the line items along with associated service charge and taxes. Event Managers, Operations teams, and Accounting teams print this report multiple times per shift or per day. Team members use this report as an invoice to present to the customer.

Siebel Hospitality can display and print several event check report views, as follows:

- **Guest view**. This is the Guest Event Check report. This report shows the charges that are relevant to the guest. This report lists the customer charges for all applicable items.
- **Guest summary**. This is the Pro Forma Event Check report. This report shows the charges that are relevant to the guest. This report lists the items for all event checks associated with a specific quote. For more information, see *Pro Forma Event Check Report*.
- **Accounting View**. This is the Accounting Event Check report. This report shows all line items broken down and categorized so all revenues can be tracked against the proper revenue buckets. This report is used internally and not shared with the guest, because every line item is broken down and guests rarely need this level of detail. For more information, see *Accounting Event Check Report*.

In other words, the Guest Event Check report shows the item charges associated with an event, while the Accounting Event Check report shows these items plus the line details that make up each one. For example, if a guest buys a package priced at 1000.00, then the Guest Event Check report shows a 1000.00 package. However, in the corresponding Accounting Event Check report, that 1000.00 is split among the components of the package.

If the Guest Event Check report is for a package event check, then the report includes a Meeting Package section and an Accommodation section. The Meeting Package section displays the meeting package prices. In sections other than the Meeting Package section, if a line item is part of a meeting package, then the line item displays Included instead of a price. If all line items in a section are Included, then the Subtotal value for that section is 0. If all line items in a section are not Included, then the Subtotal value for that section is the sum of the itemized prices.

The Guest Event Check Report is available in views of the Event Checks screen.

Fields in the Guest Event Check Report

Some fields in the Guest Event Check Report are listed in the following table.

Report Field	Comments
Business Type	The type of business of the customer organization. Choices are group and local.
Ext Qty	The extended quantity of the item needed for the function. Displays the same value as Quantity for a parent item and static child line items. In a hierarchical line item, the extended quantity of a child item is calculated as the quantity of the item multiplied by the quantity of the parent item.
Folio #	The number assigned to the folio.

Report Field	Comments
Meeting Package Display Name	If this report is for a package event check, this field displays a list of the names of meeting packages on the event check.
Pkg Type-Occ	Meeting package occupancy type, for example, Standard King-Single.
Status	The status of the event check.
Tax / SC Inclusive	Indicates whether tax and service charge are included in the price.
Total Price	The unit price of an item multiplied by the quantity of the item.
Unit Price	The total price of an item divided by the extended quantity of the item.

Pro Forma Event Check Report

This topic describes the Pro Forma Event Check Report for Siebel Hospitality.

About the Pro Forma Event Check Report

An *event check* is an invoice for an event. A *pro forma event check* is a summarized invoice to a customer for all the event check items in a quote. A pro forma event check can include one or multiple event checks, but is associated with only one quote. For more information about event checks, see *Generating Event Checks*.

The Pro Forma Event Check Report is a summarized invoice of all the items of a quote that are on event checks. For example, if a quote has ten functions and only seven of those functions are on event checks, then only those seven functions appear in the Pro Forma Event Check Report for that quote. The Pro Forma Event Check Report displays all the billable line items on a quote that are on event checks, along with associated service charges and taxes. Event Managers, Operations teams, and Accounting teams can run this report multiple times during each shift on each business day.

Siebel Hospitality can display and print several event check report views, as follows:

- **Guest view**. This is the Guest Event Check report. This report shows the charges that are relevant to the guest. This report lists the customer charges for all applicable items. For more information, see *Guest Event Check Report*.
- **Guest summary**. This is the Pro Forma Event Check report. This report shows the charges that are relevant to the guest. This report lists the items for all event checks associated with a specific quote.
- **Accounting View**. This is the Accounting Event Check report. This report shows all line items broken down and categorized so all revenues can be tracked against the proper revenue buckets. This report is used internally and not shared with the guest, because every line item is broken down and guests rarely need this level of detail. For more information, see *Accounting Event Check Report*.

If a meeting package exists on the associated quote, then this report includes a Meeting Package section and an Accommodation section. The Meeting Package section displays the meeting package prices. In sections other than the Meeting Package section, if a line item is part of a meeting package, then the line item displays Included instead of a

price. If all line items in a section are Included, then the Subtotal value for that section is 0. If all line items in a section are not Included, then the Subtotal value for that section is the sum of the itemized prices.

The Pro Forma Event Check Report is available in views of the Event Checks screen.

Fields in the Pro Forma Event Check Report

Some fields in the Pro Forma Event Check Report are listed in the following table.

Report Field	Comments
Business Type	The type of business of the customer organization. Choices are group and local.
Check #	Event check number.
Ext Qty	Extended quantity of items purchased.
Folio #	The number assigned to the folio.
Meeting Package Display Name	If meeting packages exist on the quote, this field displays a list of the names of meeting packages from the associated event checks.
Quote #	Number of the quote associated with the event checks on the report.
Pkg Type-Occ	Meeting package occupancy type, for example, Standard King-Single.

Resume Report

This topic describes the Resume Report for Siebel Hospitality.

About the Resume Report

A *resume* is a collection of all details for a single meeting or event. Each quote has a separate resume. The Resume Report captures and organizes the details of an event. The report includes sleeping room information; billing arrangements; and meeting requirements such as food, beverages, and audio-visual (AV) equipment. The Resume Report can include event details that have not been captured in the Siebel application, and that users must enter manually at the time the report is generated.

For complex groups (those requiring 75 or more sleeping rooms), the Resume Report is typically generated before the arrival of the group. You can run this report for the current date or for any future date. The Resume Report is distributed to all hotel departments and is usually shared with the meeting organizer.

The Resume Report is available in views of the Quotes screen.

Fields in the Resume Report

Some fields in the Resume Report are listed in the following table.

Report Field	Comments
Blocked	Room block total associated with the quote.
City Wide	Freeform text field, to be completed by the user. Captures details regarding a *city-wide event*, which is an event typically involving multiple hotel properties in the same area.
Commissionable Rates	Freeform text field, to be completed by the user. Captures details of commissions related to this event.
Comp Room Policy	Freeform text field, to be completed by the user. Captures details about complimentary rooms associated with this event.
Confidential Rates	Freeform text field, to be completed by the user. Captures details of room rates for this event.
In House	The peak number of attendees who can attend the event.
Pre Key	Y or N, to be completed (circled) by the user. Indicates whether or not to have keys ready at check-in.
Pre-Registration	Y or N, to be completed (circled) by the user. Indicates whether or not to conduct a pre-registration for the event.
Reserved At Cutoff	Data imported from an external reservation system.
Reserved At Pre-Conf	Data imported from an external reservation system.
Reserved At Resume	Data imported from an external reservation system.

31 User Properties Reference for Siebel Hospitality

User Properties Reference for Siebel Hospitality

This chapter documents the specific user properties for the Siebel Hospitality application. The following topics are included in this chapter:

- *About User Properties for Siebel Hospitality*
- *User Properties for Siebel Hospitality*
- *User Properties for Arrival Date Modifications*
- *User Properties for Function Space Diary*
- *User Properties for Sleeping Room Mapping*
- *User Properties for Menus and Packages*
- *User Properties for Histories and Futures*
- *User Properties for Event Checks*
- *User Properties for Banquet Event Order Report*
- *User Properties for Space Hold*
- *User Properties for Run of House*
- *User Properties for Sleeping Room Taxes and Service Charges*
- *User Properties for Pivot Applets*
- *User Properties for Meeting Packages*

About User Properties for Siebel Hospitality

User properties are object definitions that are added as children to an applet, business component, control, field, or list column to configure specialized behavior beyond what is configured in the properties of the parent object definition.

Some Siebel Hospitality functionalities are driven by user properties. You can customize these functionalities through their respective user properties. With user properties, you can control UI behavior, change default settings or leave them as they are, and enable or disable functionalities.

This topic lists user properties that are specific to Siebel Hospitality. For more information about user properties, and user properties that apply to all Siebel Business Applications, see the chapter on user properties in *Siebel Developer's Reference* .

User Properties for Siebel Hospitality

This topic describes the user properties supported for all functionalities of Siebel Hospitality. This topic describes the following business service user properties:

- *Open Day Async*
- *Parallel Quote Generation*

Open Day Async

Use this user property to open event checks asynchronously.

Open Day Async	Description
Value	Y
Parent Object Type	SHM Invoice Process business service
Usage	All the event checks for the same function date and the same property are opened asynchronously.

Parallel Quote Generation

Use this user property to create quotes in parallel.

Parallel Quote Generation	Description
Value	Y
Parent Object Type	TNT SHM Quote Service business service
Usage	If this user property is active, all quotes are generated simultaneously.

User Properties for Arrival Date Modifications

This topic describes the user properties supported for the arrival date modifications functionality in Siebel Hospitality. This topic covers the following subjects:

- *Applet User Properties for Arrival Date Modifications*

- *Business Component User Properties for Arrival Date Modifications*

Applet User Properties for Arrival Date Modifications

This topic describes the following applet user property:

- *Named Method: ShowDatePopup*

Named Method: ShowDatePopup

This user property allows you to call an applet method, on the call of the ShowDatePopup method on the applet.

Named Method: ShowDatePopup	Description
Value	INVOKE, ShowPopup, TNT SHM Arrival Date Popup Applet, Edit
Parent Object Type	Opportunity List Applet, Quote List Applet, TNT SHM Affiliate Opportunity List Applet, and TNT SHM Cluster Quote List Applet applets
Usage	This user property allows you to call the ShowPopup applet method, with the pop-up applet name and applet mode as arguments, to launch the pop-up applet on the call of the ShowDatePopup method. This method is called when a user clicks the Modify Arrival Date applet method menu item.

Business Component User Properties for Arrival Date Modifications

This topic describes the following business component user properties:

- *Arrival Date BC Name*
- *Arrival Date BC Name*
- *Arrival Date Popup Applet*
- *Arrival Date SearchSpec*
- *Day Number: Room Block Refresh BC Name*
- *Field Name: Arrival Date*
- *Field Name: Arrival Date*
- *Field Name: ChildFuncBCToRefresh*
- *Field Name: ChildRoomBcToRefresh*
- *Field Name: Function Instructions*
- *Field Name: RoomBlock Instructions*
- *Shift Functions*
- *Shift RoomBlocks*
- *Shift SubOpportunities*
- *Sub Opportunity SearchSpec*

Arrival Date BC Name

The value of this user property contains the name of the field that holds the business component name to be used for booking during a change to the arrival date. This user property is used in C++ code.

Arrival Date BC Name	Description
Value	TNT SHM Function
Parent Object Type	TNT SHM Function business component
Usage	The value of this user property contains the name of the field that holds the business component name to be used for booking during a change to the arrival date. This user property is used in C++ code for arrival date modifications functionality.

Arrival Date BC Name

The value of this user property contains the name of the field that holds the business component name to be used for booking during a change to the arrival date. This user property is used in C++ code.

Arrial Date BC Name	Description
Value	TNT SHM Quote Room Block Line Items
Parent Object Type	TNT SHM Quote Room Block Line Items business component
Usage	The value of this user property contains the name of the field that holds the business component name to be used for booking during a change to the arrival date. This user property is used in C++ code for arrival date modifications functionality.

Arrival Date Popup Applet

This user property value contains the name of the pop-up applet that is used for function instructions. This user property is used in C++ code.

Arrival Date Popup Applet	Description
Value	TNT SHM Arrival Date Popup Applet
Parent Object Type	Opportunity, TNT SHM Affiliate Opportunity, TNT SHM Sub Opportunity, and Quote business components
Usage	The value of this user property contains the name of the pop-up applet that is used for function instructions. This user property is used in C++ code for arrival date modifications functionality.

Arrival Date SearchSpec

The value of this user property contains the searchspec string to be applied to the TNT SHM Function business component to filter the functions that are frozen during a change to the arrival date. This user property is used in C++ code.

Arrival Date SearchSpec	Description
Value	`[Freeze Flag] <> 'Y'`
Parent Object Type	TNT SHM Function business component
Usage	The value of this user property contains the searchspec string to be applied to the TNT SHM Function business component to filter the functions that are frozen during a change to the arrival date. This user property is used in C++ code for arrival date modifications functionality.

Day Number: Room Block Refresh BC Name

This user property passes the room block-related business component names to be refreshed during a change to the arrival date. This user property is used in C++ code.

Day Number: Room Block Refresh BC Name	Description
Value	TNT SHM Room Block;TNT SHM Oppty Rapid Room Block Capture Line Items
Parent Object Type	Opportunity business component
Usage	This user property passes the room block-related business component names to be refreshed during a change to the arrival date. The value TNT SHM Oppty Rapid Room Block Capture Line Items is appended to the existing value. This user property is used in C++ code for arrival date modifications functionality.

Field Name: Arrival Date

This user property value contains the name of the field that is used for the arrival date. This user property is used in C++ code.

Field Name: Arrival Date	Description
Value	Hospitality Start Date
Parent Object Type	Opportunity, TNT SHM Affiliate Opportunity, and TNT SHM Sub Opportunity business components
Usage	The value of this user property contains the name of the field that is used for the arrival date. This user property is used in C++ code for arrival date modifications functionality.

Field Name: Arrival Date	Description

Field Name: Arrival Date

This user property value contains the name of the field that is used for the arrival date. This user property is used in C++ code.

Field Name: Arrival Date	Description
Value	Arrival Date
Parent Object Type	Quote business component
Usage	The value of this user property contains the name of the field that is used for the arrival date. This user property is used in C++ code for arrival date modifications functionality.

Field Name: ChildFuncBCToRefresh

The value of this user property contains the name of the field that holds the function agenda-related business component name to be refreshed during a change to the arrival date. This user property is used in C++ code.

Field Name: ChildFuncBCToRefresh	Description
Value	ChildFuncBCToRefresh
Parent Object Type	TNT SHM Affiliate Opportunity and TNT SHM Sub Opportunity business components
Usage	The value of this user property contains the name of the field that holds the function agenda-related business component name to be refreshed during a change to the arrival date. This user property is used in C++ code for arrival date modifications functionality.

Field Name: ChildRoomBcToRefresh

The value of this user property contains the name of the field that holds the room block line items-related business component name to be refreshed during a change to the arrival date. This user property is used in C++ code.

Field Name: ChildRoomBcToRefresh	Description
Value	ChildRoomBcToRefresh
Parent Object Type	TNT SHM Affiliate Opportunity and TNT SHM Sub Opportunity business components

Field Name: ChildRoomBcToRefresh	Description
Usage	The value of this user property contains the name of the field that holds the room block line items-related business component name to be refreshed during a change to the arrival date. This user property is used in C++ code for arrival date modifications functionality.

Field Name: Function Instructions

This user property value contains the name of the field that is used for function instructions. This user property is used in C++ code.

Field Name: Function Instructions	Description
Value	Function Instructions
Parent Object Type	Opportunity, TNT SHM Affiliate Opportunity, TNT SHM Sub Opportunity, Quote, and TNT SHM Arrival Date VBC business components
Usage	The value of this user property contains the name of the field that is used for function instructions. This user property is used in C++ code for arrival date modifications functionality.

Field Name: RoomBlock Instructions

This user property value contains the name of the field that is used for room block instructions. This user property is used in C++ code.

Field Name: RoomBlock Instructions	Description
Value	RoomBlock Instructions
Parent Object Type	Opportunity, TNT SHM Affiliate Opportunity, TNT SHM Sub Opportunity, Quote, and TNT SHM Arrival Date VBC business components
Usage	The value of this user property contains the name of the field that is used for room block instructions. This user property is used in C++ code for arrival date modifications functionality.

Shift Functions

This user property is used to send instructions to the code as to whether or not to shift functions during the in-line modification of an arrival date. The default value is Y.

Shift Functions	Description
Value	Y or N

Shift Functions	Description
Parent Object Type	Opportunity, TNT SHM Affiliate Opportunity, TNT SHM Sub Opportunity, and Quote business components
Usage	This user property is used to send instructions to the code as to whether or not to shift functions during the in-line modification of an arrival date. This user property is used in C++ code. The default value is Y.

Shift RoomBlocks

This user property is used to send instructions to the code as to whether or not to shift room blocks during the in-line modification of an arrival date. The default value is Y.

Shift RoomBlocks	Description
Value	Y or N
Parent Object Type	Opportunity, TNT SHM Affiliate Opportunity, TNT SHM Sub Opportunity, and Quote business components
Usage	This user property is used to send instructions to the code as to whether or not to shift room blocks during the in-line modification of an arrival date. This user property is used in C++ code. The default value is Y.

Shift SubOpportunities

This user property is used to send instructions to the code as to whether or not to shift subopportunities during the in-line modification of an arrival date. The default value is Y.

Shift SubOpportunities	Description
Value	Y or N
Parent Object Type	Opportunity business component
Usage	This user property is used to send instructions to the code as to whether or not to shift subopportunities during the in-line modification of an arrival date. This user property is used in C++ code. The default value is Y.

Sub Opportunity SearchSpec

The value of this user property contains the searchspec string to be applied to the Opportunity business component to retrieve the subopportunities during a change to the arrival date. This user property is used in C++ code.

Sub Opportunity SearchSpec	Description
Value	`[Relationship Type LIC] = 'Sub-Recurrence'`
Parent Object Type	Opportunity business component
Usage	The value of this user property contains the searchspec string to be applied to the Opportunity business component to retrieve the subopportunities during a change to the arrival date. This user property is used in C++ code for arrival date modifications functionality.

User Properties for Function Space Diary

This topic describes the user properties supported for the Function Space Diary functionality of Siebel Hospitality. This topic covers the following subjects:

- *Applet User Properties for Function Space Diary*
- *TNT SHM Compact Function Space Diary Applet User Properties*
- *Business Component User Properties for Function Space Diary*
- *TNT SHM Gantt AX Date Time Interval PopUp Business Component User Properties*

Applet User Properties for Function Space Diary

This topic describes the following applet user properties:

- *Abbreviation Fields | ABBR 0*
- *Abbreviation Fields | ABBR 1*
- *Abbreviation Fields | ABBR 2*
- *Abbreviation Fields | ABBR 3*
- *Abbreviation Fields | ABBR 4*
- *Actual and Abbreviation Field 1*
- *Actual and Abbreviation Field 2*
- *Actual and Abbreviation Field 3*
- *Actual and Abbreviation Field 4*
- *Actual and Abbreviation Field 5*
- *Actual and Abbreviation Field 6*
- *Actual and Abbreviation Field 7*
- *Actual and Abbreviation Field 8*
- *Actual and Abbreviation Field 9*
- *Actual and Abbreviation Field 10*
- *CanModifyLayout*
- *Color Code Major Axis 1*

- *Color Code Major Axis 2*
- *Color Code Major Axis 3*
- *Color Code Major Axis 4*
- *Color Code Major Axis 5*
- *Color Code Major Axis 6*
- *Color Code Minor Axis 1*
- *Color Code Minor Axis 2*
- *Delimiter*
- *Enable Color Icon*
- *Icon Display Fields 0*
- *Icon Display Fields 1*
- *Icon Display Fields 2*
- *Item Color Toggle Activate Fields*
- *Item Color Toggle BC Name*
- *Item Color Toggle Field*
- *Item Time Display Toggle Time Label 9*
- *Item Time Display Toggle Time Tooltip ABBR 0*
- *Max X Pages*
- *Max Y Rows Per Page*
- *Month Day View*
- *OnDoubleClick Invoke BC*
- *OnDoubleClick Invoke Service*
- *OnDoubleClick Invoke Service Method*
- *Small Red Triangle Comment Icon*
- *Special Date BC Name*
- *Special Day Description*
- *Special Day Type*
- *Views Displaying Across The Months*
- *Views Having No Y-Axis Header*
- *Views Having Space Crunch for Icons*
- *Weekend Admin BC Name*
- *Y-Axis Header Display Format*

Abbreviation Fields | ABBR 0

Use this user property to get the abbreviated field values according to the field value selected in the Display drop-down list in the Function Space Diary.

Abbreviation Fields | ABBR 0	Description
Value	Function Type Abbr;Business Type Abbr

Abbreviation Fields | ABBR 0	Description
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Gets the combination of abbreviations of the actual fields from the TNT SHM Function Booking VBC business component. The name of the user property must end with ABBR x (where *x* indicates 0,1,2...), which matches the language independent code (LIC) of the selection in the Display drop-down list in the Function Space Diary.

Abbreviation Fields | ABBR 1

Use this user property to get the abbreviated field values according to the field value selected in the Display drop-down list in the Function Space Diary.

Abbreviation Fields | ABBR 1	Description
Value	Setup Style Abbr;Expected Num Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Abbreviation Fields | ABBR 0* user property.

Abbreviation Fields | ABBR 2

Use this user property to get the abbreviated field values according to the field value selected in the Display drop-down list in the Function Space Diary.

Abbreviation Fields | ABBR 2	Description
Value	Event Manager Abbr;Sales Manager Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Abbreviation Fields | ABBR 0* user property.

Abbreviation Fields | ABBR 3

Use this user property to get the abbreviated field values according to the field value selected in the Display drop-down list in the Function Space Diary.

Abbreviation Fields | ABBR 3	Description
Value	Quote Name Abbr;Function Name Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Abbreviation Fields | ABBR 0* user property.

Abbreviation Fields | ABBR 4

Use this user property to get the abbreviated field values according to the field value selected in the Display drop-down list in the Function Space Diary.

Abbreviation Fields | ABBR 4	Description
Value	Function Status Abbr;Meal Period Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Abbreviation Fields | ABBR 0* user property.

Actual and Abbreviation Field 1

Use this user property to define the actual field and the corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 1	Description
Value	Function Type;Function Type Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The TNT SHM Function Booking VBC business component has been configured in the Item Business Component applet user property for all the parent object types (mentioned in the previous row). The first part of the user property value represents the actual field value of the TNT SHM Function Booking VBC business component. The second part of the user property value represents the abbreviation of the corresponding actual field. If the value is available, then the corresponding abbreviation is displayed in the label and tooltip in the Function Space Diary in place of the actual field value.

Actual and Abbreviation Field 2

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 2	Description
Value	Business Type;Business Type Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

Actual and Abbreviation Field 3

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 3	Description
Value	Setup Style;Setup Style Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

Actual and Abbreviation Field 4

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 4	Description
Value	Expected Num;Expected Num Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary and TNT SHM Function Space Diary Total Availability Applet Applets
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

Actual and Abbreviation Field 5

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 5	Description
Value	Event Manager;Event Manager Abbr

Actual and Abbreviation Field 5	Description
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

Actual and Abbreviation Field 6

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 6	Description
Value	Sales Manager;Sales Manager Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

Actual and Abbreviation Field 7

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 7	Description
Value	Quote Name;Quote Name Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

Actual and Abbreviation Field 8

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 8	Description
Value	Function Name;Function Name Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets

Actual and Abbreviation Field 8	Description
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

Actual and Abbreviation Field 9

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 9	Description
Value	Function Status;Function Status Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

Actual and Abbreviation Field 10

Use this user property to define the actual field and corresponding abbreviation in the Function Space Diary.

Actual and Abbreviation Field 10	Description
Value	Meal Period;Meal Period Abbr
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	The usage is the same as the *Actual and Abbreviation Field 1* user property.

CanModifyLayout

Use this user property to allow users to modify the applet UI layout through the Columns Displayed option.

CanModifyLayout	Description
Value	N
Parent Object Type	TNT SHM Property Projected / Blocked List Applet applet
Usage	Controls the Columns Displayed option in the Siebel Business Applications standard applet menu. To enable the Columns Displayed applet menu item, change the value to Y.

Color Code Major Axis 1

Use this user property to specify the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary.

Color Code Major Axis 1	Description
Value	2
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary. The value 2 represents the LIC value for the Day/Day-Part time scale.

Color Code Major Axis 2

Use this user property to specify the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary.

Color Code Major Axis 2	Description
Value	4
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary. The value 4 represents the LIC value for the Day/Hour time scale.

Color Code Major Axis 3

Use this user property to specify the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary.

Color Code Major Axis 3	Description
Value	8
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary. The value 8 represents the LIC value for the Day/Half-Hour time scale.

Color Code Major Axis 4

Use this user property to specify the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary.

Color Code Major Axis 4	Description
Value	16
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary. The value 16 represents the LIC value for the Day/Quarter-Hour time scale.

Color Code Major Axis 5

Use this user property to specify the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary.

Color Code Major Axis 5	Description
Value	128
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary. The value 128 represents the LIC value for the Week/Day/Day-Part time scale.

Color Code Major Axis 6

Use this user property to specify the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary.

Color Code Major Axis 6	Description
Value	256
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale for which the color coding and icons are displayed in the major axis of the Function Space Diary. The value 256 represents the LIC value for the Month/Day-of-week/Day Part time scale.

Color Code Minor Axis 1

Use this user property to specify the time scale for which the color coding and icons are displayed in the minor axis of the Function Space Diary.

Color Code Minor Axis 1	Description
Value	1
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale for which the color coding and icons are displayed in the minor axis of the Function Space Diary. The value 1 represents the LIC value for the Week/Day time scale.

Color Code Minor Axis 2

Use this user property to specify the time scale for which the color coding and icons are displayed in the minor axis of the Function Space Diary.

Color Code Minor Axis 2	Description
Value	32
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale for which the color coding and icons are displayed in the minor axis of the Function Space Diary. The value 32 represents the LIC value for the Month/Day-of-week time scale.

Delimiter

Use this user property to specify the delimiter when a combination is selected in the Display LOV of the Function Space Diary.

Delimiter	Description
Value	/
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Specifies the delimiter when a combination is selected in the Display LOV in the Function Space Diary.
Example	Board Meeting/Conference, if Function Name/Function Type is selected in the Display LOV of the Function Space Diary.

Delimiter	Description

Enable Color Icon

Use this user property to enable or disable color coding in the Function Space Diary.

Enable Color Icon	Description
Value	Y
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Turns color coding on or off in the Function Space Diary. If the value is N, no color icons are displayed.

Icon Display Fields 0

Use this user property to associate an icon with specific special events.

Icon Display Fields 0	Description
Value	Holiday;301
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Associates an icon with specific special events. Icon identifier 301 is associated with Holiday and configured in the C++ code.

Icon Display Fields 1

Use this user property to associate an icon with specific special events.

Icon Display Fields 1	Description
Value	Special Day Event;302
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Associates an icon with specific special events. Icon identifier 302 is associated with Special Event and configured in the C++ code.

Icon Display Fields 2

Use this user property to associate an icon with specific special events.

Icon Display Fields 2	Description
Value	Sell Note;303
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary and TNT SHM Function Space Diary Total Availability Applet Applets
Usage	Associates an icon with specific special events. Icon identifier 303 is associated with Sell Note and configured in the C++ code.

Item Color Toggle Activate Fields

Use this user property to activate fields that are used in the function booking color scheme based on the *Item Color Toggle Field* user property value.

Item Color Toggle Activate Fields	Description
Value	Function Status;Quote Status
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary applets
Usage	This user property is used to activate all the fields that could be returned as the value of the *Item Color Toggle Field* user property.

Item Color Toggle BC Name

Use this user property to define business components for toggle colors.

Item Color Toggle BC Name	Description
Value	TNT SHM Gantt AX Admin Function Status Color
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary applets
Usage	This user property is used in C++ code to return the toggle color codes configured in the Function Space Administration screen, Function Status Color Schema applet. Define similar user properties if any other toggle colors are available. For example, if you want to define toggle color codes for Quote Status, then define a similar user property such as Item Color Toggle BC Name 1 with a value of TNT SHM Gantt AX Admin Quote Status Color.

Item Color Toggle Field

The field name is defined in the TNT SHM Gantt AX Date Time Interval PopUp VBC business component. The value is the status field in the TNT SHM FSI Booking business component, based on the selected booking color scheme.

Item Color Toggle Field	Description
Value	Booking Color Toggle Field
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary applets
Usage	This user property is used to return the status for which a toggle color is defined.
Example	If the function color booking scheme is selected as Quote Status, then the Booking Color Toggle field returns a value of Quote Status. This value is the field name in the TNT SHM FSI Booking business component. If the field does not exist, then you must configure the field in the TNT SHM FSI Booking business component. The value of the status field is returned in C++ code to identify the associated color code, if it is defined in the Function Space Administration screen, Quote Status Color Schema applet.

Item Time Display Toggle Time Label 9

Use this user property to display the Expected Number of Attendees field in the Booking Label when Expected Num is selected in the Display LOV of the Function Space Diary.

Item Time Display Toggle Time Label 9	Description
Value	Expected Num
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	If the value is available, the value of the Expected Num field is displayed in the Booking Label when Expected Num is selected in the Display LOV of the Function Space Diary. The name of this user property must end with x (where *x* indicates 0,1,2...).

Item Time Display Toggle Time Tooltip ABBR 0

Use this user property to get the abbreviated field values in the tooltip according to the field value selected in the Display LOV in the Function Space Diary.

Item Time Display Toggle Time Tooltip ABBR 0	Description
Value	Booking Set Up Tip;Booking Tip - Abbreviation;Booking Tear Down Tip;Booking Tear Down Tip

Item Time Display Toggle Time Tooltip ABBR 0	Description
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary and TNT SHM Function Space Diary Total Availability Applet Applets
Usage	Gets the combination of abbreviations of the actual fields from the TNT SHM Function Booking VBC business component and displays the resulting value in the tooltip. The name of the user property must end with ABBR x (where *x* indicates 0,1,2...), which matches the LIC of the selection in the Display LOV in the Function Space Diary.

Max X Pages

This user property is used to configure the number of horizontal pages for which Function Space Diary information is to be displayed.

Max X Pages	Description
Value	2
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to configure the number of horizontal pages for which Function Space Diary information is to be displayed.

Max Y Rows Per Page

This user property is used to configure the number of visible function spaces for which Function Space Diary information is to be displayed.

Max Y Rows Per Page	Description
Value	15
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to configure the number of visible function spaces for which Function Space Diary information is to be displayed.

Max Y Rows Per Page	Description

Month Day View

Use this user property to specify the time scale in which to display information for the whole month in the Function Space Diary.

Month Day View	Description
Value	64
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the time scale in which to display information for the whole month in the Function Space Diary. The value 64 represents the LIC value for the Month/Day time scale.

OnDoubleClick Invoke BC

Use this user property to configure the business component to retrieve the double-click event details when a user double-clicks the Function Space Diary grid. When the double-click event occurs, Siebel Hospitality sends data, such as time, property, and function space, to a business service method, which is configured through the *OnDoubleClick Invoke Service* and *OnDoubleClick Invoke Service Method* user properties.

OnDoubleClick Invoke BC	Description
Value	TNT SHM Gantt AX Date Time Interval PopUp VBC
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Specifies the business component to get parameters, such as time and function space, from the business component when double-clicked in the Function Space Diary.

OnDoubleClick Invoke Service

Use this user property to configure the business component to retrieve the double-click event details when a user double-clicks the Function Space Diary grid. When the double-click event occurs, Siebel Hospitality sends data, such as time, property, and function space, to a business service method, which is configured through this user property and the *OnDoubleClick Invoke Service Method* user property.

OnDoubleClick Invoke Service	Description
Value	SHM Function Service

OnDoubleClick Invoke Service	Description
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Calls a business service to retrieve the double-click event details from the method defined in the OnDoubleClick Invoke Service Method user property.

OnDoubleClick Invoke Service Method

Use this user property to configure the business component to retrieve the double-click event details when a user double-clicks the Function Space Diary grid. When the double-click event occurs, Siebel Hospitality sends data such as time, property, and function space to a business service method, which is configured through the *OnDoubleClick Invoke Service* user property and this user property.

OnDoubleClick Invoke Service Method	Description
Value	OnDoubleClickFSDInfo
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the business service method that is called when double-clicked in the Function Space Diary. This business service method must be defined in the service that is configured in the OnDoubleClick Invoke Service user property.

Small Red Triangle Comment Icon

Use this user property to associate the bitmap identifier with the Small Red Triangle icon (a three-cornered flag, which is red) displayed in the Function Space Diary for special events.

Small Red Triangle Comment Icon	Description
Value	304
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Associates the bitmap identifier with the Small Red Triangle icon displayed in Function Space Diary for the Month/Day time scale. The value 304 represents the Small Red Triangle configured in C++ code.

Special Date BC Name

Use this user property to define the business component from which special day event details can be retrieved.

Special Date BC Name	Description
Value	TNT SHM Property Special Dates Action business component
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the business component from which special day event details can be retrieved. The special day data is retrieved from this business component and displayed in the respective Day columns in the Function Space Diary.

Special Day Description

Use this user property to retrieve the descriptions of special days, if any, in a tooltip in the Function Space Diary.

Special Day Description	Description
Value	Holiday Desc;Sell Note Desc;Special Event Desc
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Indicates whether or not to display special day descriptions in a Function Space Diary tooltip. By default, the values are descriptions for three special days and have one-to-one mappings with the values of the Special Day Type user property. The combination can be modified by removing or adding new entries in accordance with the value of the Special Day Type user property.
Example	Holiday Desc;Special Event Desc

Special Day Type

Use this user property to display the descriptions of special days, if any, in a tooltip in the Function Space Diary.

Special Day Type	Description
Value	Holiday;Sell Notes;Special Events
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Indicates whether or not to display special day descriptions in a Function Space Diary tooltip. By default, the values are three special day types. The combination can be modified by removing or adding new entries.
Example	Holiday;Special Events

Views Displaying Across The Months

Use this user property to calculate the End Date/Month information, which is used to display Y-Axis header information (Month and Year) in the Function Space Diary.

Views Displaying Across The Months	Description
Value	256
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	In the Function Space Diary, on some time scales, it might not be possible to identify for which month and year the data is displayed. For such time scales, month and year information is displayed on the Y-Axis Header. By default, the value is 256, which is the LIC value for the Month/Day-of-week/Day Part time scale. To support other time scales, append each value with a semicolon (;) delimiter.
Example	256;64;128

Views Having No Y-Axis Header

Use this user property to hide the Y-Axis Header information in the Function Space Diary

Views Having No Y-Axis Header	Description
Value	1;32
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	In the Function Space Diary, on some time scales, it might not be necessary to display information on the Y-Axis header. By default, the value is 1;32. These numbers are LIC values for certain time scales.

Views Having Space Crunch for Icons

Use this user property to define the time scales for which there is insufficient space to display more than two icons in the same column header in the Function Space Diary.

Views Having Space Crunch for Icons	Description
Value	1;128
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets

Views Having Space Crunch for Icons	Description
Usage	Defines the time scales for which there is insufficient space to display more than two icons in the same column header. In this case, C++ code adjusts the space. Currently there is insufficient space for two time scales (Week/Day and Week/Day/Day Part) when there are more than two icons in the same column header. The values 1 and 128 represent LIC values for Week/Day and Week/Day/Day Part respectively.

Weekend Admin BC Name

Use this user property to define the business component from which to retrieve weekend details for a given property. The Function Space Diary uses these weekend details to decide whether a day is a weekday or a weekend day, to display the correct color and icon in date column headers.

Weekend Admin BC Name	Description
Value	TNT SHM Weekend Admin
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Defines the business component from which weekend details can be retrieved. The weekend data is used to decide color and icon to display in day columns in the Function Space Diary.

Y-Axis Header Display Format

Use this user property to determine the format for the date to be displayed on the Y-Axis header in the Function Space Diary for some time scales.

Y-Axis Header Display Format	Description
Value	MMMM YYYY
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet applets
Usage	Specifies the Y-Axis header display format in the Function Space Diary, for example, August 2008. This user property is applicable only if month and year are displayed on the Y-Axis header.

TNT SHM Compact Function Space Diary Applet User Properties

This topic describes the following user properties for the TNT SHM Compact Function Space Diary applet of the Function Space Diary:

- *Booking Drop Conflict Popup Default*

- *Booking Drop Conflict Popup Name*
- *DateTime Popup Name*
- *Day Assignment Business Component*
- *Day Assignment Date Field Name*
- *Day Assignment Popup Applet*
- *Drop Conflict Popup Name*
- *End Date*
- *Function Drop Conflict Popup Default*
- *Function Drop Conflict Popup Name*
- *Grid Background Color*
- *Grid Line Color*
- *Grid Line Style*
- *Ignore Case Sensitivity*
- *Ineffective Field*
- *Item Admin Color BC Name*
- *Item Admin Color BO Name*
- *Item Admin Special Control BC Name*
- *Item BC Assignable Field*
- *Item BC Dependency Field*
- *Item BC Drillable Field*
- *Item BC Editable Field*
- *Item BC Inventory Status Field*
- *Item Border Style Fields*
- *Item Border Style No Setup Time Fields*
- *Item Border Style No Teardown Time Fields*
- *Item Border Style No Turn Time Fields*
- *Item Business Component*
- *Item Drag Method*
- *Item Drilldown Assignment*
- *Item Drilldown Src Field Substitutes*
- *Item Fill Style Fields*
- *Item Function Business Component*
- *Item Icon Clip Text LIC*
- *Item Icon Clip Text LOV Name*
- *Item Icon Fields*
- *Item Icon Ids*
- *Item Id Field*

- *Item Join Field*
- *Item Left Click Method*
- *Item Resize Method*
- *Item Right Click Method*
- *Item Segment Left Click Methods*
- *Item Time Dependency Fields*
- *Item Time Dependency Tooltip Fields*
- *Item Time Display Toggle LOV Type*
- *Item Time Display Toggle Time Label 0*
- *Item Time Display Toggle Time Label 1*
- *Item Time Display Toggle Time Label 2*
- *Item Time Display Toggle Time Label 3*
- *Item Time Display Toggle Time Label 4*
- *Item Time Display Toggle Time Label 5*
- *Item Time Display Toggle Time Label 6*
- *Item Time Display Toggle Time Label 7*
- *Item Time Display Toggle Time Label 8*
- *Item Time Display Toggle Time Label 10*
- *Item Time Display Toggle Time Label 12*
- *Item Time Display Toggle Time Label 13*
- *Item Time Display Toggle Time Label 17*
- *Item Time Display Toggle Time Tooltip 0*
- *Item Time Display Toggle Time Tooltip 1*
- *Item Time Display Toggle Time Tooltip 2*
- *Item Time Display Toggle Time Tooltip 3*
- *Item Time Display Toggle Time Tooltip 4*
- *Item Time Display Toggle Time Tooltip 5*
- *Item Time Display Toggle Time Tooltip 6*
- *Item Time Display Toggle Time Tooltip 7*
- *Item Time Display Toggle Time Tooltip 8*
- *Item Time Display Toggle Time Tooltip 17*
- *Item Time Fields*
- *Item Time Ineffective Tooltip Fields*
- *Item Time Unavailable Tooltip Fields*
- *Item Tooltip Fields*
- *Item Type Field*
- *Item Unavailable Color Field*

- *Number of Rows to Overlap*
- *Parent BC Date Context Field*
- *Sell Notes - Special Dates Business Component*
- *Sell Notes - Special Dates Popup Applet*
- *Sell Notes - Special Dates Start Date Field Name*
- *Slider Width(Height)*
- *Start Date*
- *Time BC Start Time Field*
- *Time Business Component*
- *TNT CMT Same Time Frame - Show Move Popup Applet*
- *Unavailable Field*
- *X Axis Popup Height*
- *X Axis Popup Width*
- *X-Axis Background Color*
- *X-Axis Height*
- *X-Axis Line Color*
- *X-Axis Line Style*
- *Y Axis Join Field*
- *Y-Axis Background Color*
- *Y-Axis Business Component*
- *Y-Axis Draw Sides*
- *Y-Axis Drilldown Index Field*
- *Y-Axis Drilldown Src Field Substitutes*
- *Y-Axis Header Background Color*
- *Y-Axis Header Label Text*
- *Y-Axis Header Line Color*
- *Y-Axis Header Line Style*
- *Y-Axis Hierarchy*
- *Y-Axis Hierarchy Drilldown Assignment*
- *Y-Axis Item Dimensions*
- *Y-Axis Item Fields*
- *Y-Axis Item Font Colors*
- *Y-Axis Item Icons*
- *Y-Axis Item Tooltip Fields*
- *Y-Axis Item Types*
- *Y-Axis Left Click Methods*
- *Y-Axis Line Color*

- *Y-Axis Line Style*
- *Y-Axis Line Width*
- *Y-Axis Row Type Field*
- *Y-Axis Width*

Booking Drop Conflict Popup Default

If the pop-up applet name is not specified in the Booking Drop Conflict Popup Name user property, then this user property is used to specify the default selection option in the booking conflict pop-up window.

Booking Drop Conflict Popup Default	Description
Value	Option
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	When a booking conflict occurs, a user can select either the OK, Option, Overbook, or Cancel option in the booking conflict pop-up window. If the pop-up applet name is not specified in the Booking Drop Conflict Popup Name user property, then this user property is used to specify the default option.

Booking Drop Conflict Popup Name

This user property is used to specify the applet name for the booking conflict pop-up window.

Booking Drop Conflict Popup Name	Description
Value	TNT SHM Booking Option/Overbook Popup Applet
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the applet name for the booking conflict pop-up window.

DateTime Popup Name

This user property is used to specify the applet used to query for function space bookings in an interval.

DateTime Popup Name	Description
Value	TNT SHM Gantt Chart Query DateTime Interval Form Applet
Parent Object Type	TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period,

DateTime Popup Name	Description
	TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the applet used to query for function space bookings in an interval.

Day Assignment Business Component

This user property is used to specify the business component that supports the function for assigning all the category bookings on a selected diary date to a specific space.

Day Assignment Business Component	Description
Value	TNT SHM Function Space Diary Assign Day VBC
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the business component that supports the function for assigning all the category bookings on a selected diary date to a specific space.

Day Assignment Date Field Name

This user property is used to specify the field from which the day assignment date is retrieved.

Day Assignment Date Field Name	Description
Value	Date
Parent Object Type	TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Setup Style, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the field from which the day assignment date is retrieved.

Day Assignment Popup Applet

This user property is used to specify the pop-up applet to be used for day assignments.

Day Assignment Popup Applet	Description
Value	TNT SHM Function Space Diary Assign Day Popup Form Applet

Day Assignment Popup Applet	Description
Parent Object Type	TNT SHM Function Space Diary - Quote Name, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Setup Style, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary
Usage	This user property is used to specify the pop-up applet to be used for day assignments.

Drop Conflict Popup Name

This user property is used to specify the pop-up applet to be displayed when a booking conflict occurs.

Drop Conflict Popup Name	Description
Value	TNT SHM Option/Overbook Popup Applet
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the pop-up applet to be displayed when a booking conflict occurs. This applet will display selection options such as Option, Overbook, and so on.

End Date

This user property is used to specify the field name from which the effective end date of the function is retrieved.

End Date	Description
Value	End Date
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the field name from which the effective end date of the function is retrieved.

Function Drop Conflict Popup Default

If the booking conflict pop-up applet is not specified, this user property is used to specify the default operation to be performed when a booking conflict occurs.

Function Drop Conflict Popup Default	Description
Value	OptionFunction

Function Drop Conflict Popup Default	Description
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	If the booking conflict pop-up applet is not specified, this user property is used to specify the default operation to be performed when a booking conflict occurs.

Function Drop Conflict Popup Name

This user property is used to specify the pop-up applet to be displayed when a booking conflict occurs.

Function Drop Conflict Popup Name	Description
Value	TNT SHM Function Option/Overbook Popup Applet
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the pop-up applet to be displayed when a booking conflict occurs. This applet will display selection options such as Option, Overbook, and so on.

Grid Background Color

This user property is used to set the background color of the Function Space Diary Grid.

Grid Background Color	Description
Value	16777215
Parent Object Type	TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to set the background color of the Function Space Diary Grid.

Grid Line Color

This user property is used to set the line color of the Function Space Diary Grid.

Grid Line Color	Description
Value	13421772
Parent Object Type	TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to set the line color of the Function Space Diary Grid.

Grid Line Style

This user property is used to specify the style for the Function Space Diary Grid lines.

Grid Line Style	Description
Value	0
Parent Object Type	TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the style for the Function Space Diary Grid lines.

Ignore Case Sensitivity

This user property is used to control the case sensitivity for comparing function space strings and the string entered in the Go To field.

Ignore Case Sensitivity	Description
Value	Y
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to control the case sensitivity for comparing function space strings and the string entered in the Go To field.

Ineffective Field

This user property is used to specify the field from which the Function Space Diary retrieves the information about whether or not the function space is ineffective.

Ineffective Field	Description
Value	Is Ineffective
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	In the Function Space Diary, if a function space is ineffective, then the Diary displays the ineffective bar. This user property is used to specify the field from which the Diary retrieves the information about whether or not the function space is ineffective.

Item Admin Color BC Name

This user property is used to specify the business component from which colors for different function space statuses are defined in the Function Space Administration view.

Item Admin Color BC Name	Description
Value	TNT SHM Gantt AX Admin Function Status
Parent Object Type	TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the business component from which colors for different function space statuses are defined in the Function Space Administration view.

Item Admin Color BO Name

This user property is used to specify the business object from which colors for different function space statuses are defined in the Function Space Administration view.

Item Admin Color BO Name	Description
Value	System Preferences
Parent Object Type	TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet, TNT SHM Function Space

Item Admin Color BO Name	Description
	Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the business object from which colors for different function space statuses are defined in the Function Space Administration view.

Item Admin Special Control BC Name

This user property is used to specify the name of the business component from which information about specialized controls such as setup time pattern and tear-down time pattern is collected.

Item Admin Special Control BC Name	Description
Value	TNT SHM Gantt AX Admin Specialized Controls
Parent Object Type	TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the name of the business component from which information about specialized controls such as setup time pattern and tear-down time pattern is collected.

Item BC Assignable Field

This user property is used to specify the field from which the required value (Assignable) is retrieved.

Item BC Assignable Field	Description
Value	Assignable
Parent Object Type	TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the field from which the required value (Assignable) is retrieved.

Item BC Dependency Field

This user property is used to specify the field from which the required value (Dependency) is retrieved.

Item BC Dependency Field	Description
Value	Dependency
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the field from which the required value (Dependency) is retrieved.

Item BC Drillable Field

This user property is used to specify the field from which the required value (Drillable) is retrieved.

Item BC Drillable Field	Description
Value	Drillable
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the field from which the required value (Drillable) is retrieved.

Item BC Editable Field

This user property is used to specify the field from which the required value (Editable) is retrieved.

Item BC Editable Field	Description
Value	Editable
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the field from which the required value (Editable) is retrieved.

Item BC Inventory Status Field

This user property is used to specify the field from which the required value (Inventory status) is retrieved.

Item BC Inventory Status Field	Description
Value	Inventory Status

Item BC Inventory Status Field	Description
Parent Object Type	TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the field from which the required value (Inventory status) is retrieved.

Item Border Style Fields

This user property is used to specify the dimensions for the duration bars in the Function Space Diary.

Item Border Style Fields	Description
Value	7;3;11;0
Parent Object Type	TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	Each booking item is displayed as a time duration bar on the Function Space Diary page. The bar is composed of four smaller bars, representing setup time, configured space booking, tear down time, and a time block that is currently not used in the application. This user property is used to specify the dimensions for each of these bars.

Item Border Style No Setup Time Fields

This user property is used to specify the dimensions for booking items in the Function Space Diary when there is no setup time for the function space.

Item Border Style No Setup Time Fields	Description
Value	0;7;11;0
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	Each booking item is displayed as a time duration bar on the Function Space Diary page. The bar is composed of four smaller bars, representing setup time, configured space booking, tear down time, and a time block that is currently not used in the application. This user property is used to specify the dimensions for booking items when there is no setup time for the function space.

Item Border Style No Teardown Time Fields

This user property is used to specify the dimensions for booking items in the Function Space Diary when there is no teardown time for the function space.

Item Border Style No Teardown Time Fields	Description
Value	7;11;0;0
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	Each booking item is displayed as a time duration bar on the Function Space Diary page. The bar is composed of four smaller bars, representing setup time, configured space booking, tear down time, and a time block that is currently not used in the application. This user property is used to specify the dimensions for booking items when a user deselects the turn time flag on the applet.

Item Border Style No Turn Time Fields

This user property is used to specify the dimensions for booking items in the Function Space Diary when there is no teardown time for the function space.

Item Border Style No Turn Time Fields	Description
Value	0;15;0;0
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	Each booking item is displayed as a time duration bar on the Function Space Diary page. The bar is composed of four smaller bars, representing setup time, configured space booking, tear down time, and a time block that is currently not used in the application. This user property is used to specify the dimensions for booking items when a user deselects the turn time flag on the applet.

Item Business Component

This user property is used to specify the business component used by the booking item.

Item Business Component	Description
Value	TNT SHM Compact Function Booking VBC
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet

Item Business Component	Description
Usage	This user property is used to specify the business component used by the booking item.

Item Drag Method

This user property is used to specify the method name when a booking item is selected and (without releasing the selection) moved to the Gantt chart.

Item Drag Method	Description
Value	InvokeDragItem
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the method name when a booking item is selected and moved to the Gantt chart.

Item Drilldown Assignment

This user property is used to specify the drill-down link for each bar in the Function Space Diary booking item.

Item Drilldown Assignment	Description
Value	Item Drilldown;Item Drilldown;Item Drilldown;Item Drilldown
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	Each booking item is displayed as a time duration bar on the Function Space Diary page. The bar is composed of four smaller bars, representing setup time, configured space booking time, tear-down time, and a time block that is currently not used in the application. This user property is used to specify the drill-down link for each bar in the booking item.

Item Drilldown Src Field Substitutes

This user property specifies the destination that Siebel Hospitality displays when a user clicks a booking item. Use this user property to navigate to the destination view when drilling down on the booking in the Function Space Diary.

Item Drilldown Src Field Substitutes	Description
Value	Item Drilldown;Quote Id
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the destination that Siebel Hospitality displays when a user clicks a booking item. If Quote Id is specified when a user drills down on the booking in the Function Space Diary, this user property navigates to the Quotes screen, Functions view. If Function Id is specified when a user drills down on the booking in the Function Space Diary, this user property navigates to the Functions screen.

Item Fill Style Fields

Item Fill Style Fields	Description
Value	Setup Time;Configured Space Booking;Tear Down Time;Tear Down Time
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	Each booking item is displayed as a time-duration bar on the Function Space Diary page. The bar is composed of four smaller bars, representing setup time, configured space booking time, tear-down time, and a time block that is currently not used in the application.

Item Function Business Component

This user property is used to specify the business component to be used for the Function Booking Item.

Item Function Business Component	Description
Value	TNT SHM FSI Booking
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the business component to be used for the Function Booking Item.

Item Icon Clip Text LIC

This user property is used to specify the icon clip text on the booking item.

Item Icon Clip Text LIC	Description
Value	Noise;Detail;Suite;Function Scheduling;Do Not Move;Recurring;Host;Affiliate;24 Hour Hold
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name TNT SHM Function Space Diary - Setup Style
Usage	When a function is created, flags such as Noise, Detail, Suite, and so on are displayed in the function. This user property is used to specify the icon clip text on the booking item.

Item Icon Clip Text LOV Name

This user property is used to specify the list of values from which the clip text is retrieved.

Item Icon Clip Text LOV Name	Description
Value	TNT_SHM_GNTAX_ICON_CLIPTEXT
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the list of values from which the clip text is retrieved.

Item Icon Fields

This user property is used to specify the field names to which item icons refer.

Item Icon Fields	Description
Value	Noise Flag;Detail Flag;Suite Flag;Function Schedule Flag;Do Not Move Calc;Sub Recurrence Flag;Host Flag;Affiliate Flag;24 Hour Hold Flag
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet

Item Icon Fields	Description
Usage	This user property is used to specify the field names to which item icons refer.

Item Icon Ids

This user property is used to specify the Ids for item icons.

Item Icon Ids	Description
Value	201;215;216;217;203;218;219;220;202
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the Ids for item icons.

Item Id Field

This user property is used to specify the field to which each booking item refers.

Item Id Field	Description
Value	Booking Id
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the field to which each booking item refers.

Item Join Field

This user property is used to specify the link between a booking and a function space.

Item Join Field	Description
Value	Function Space Id

Item Join Field	Description
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the link between a booking and a function space.

Item Left Click Method

This user property is used to specify the method to be called when a user left-clicks a booking item.

Item Left Click Method	Description
Value	InvokeDrillDown
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the method to be called when a user left-clicks a booking item.

Item Resize Method

This user property is used to specify the method to be called when a booking item is resized.

Item Resize Method	Description
Value	InvokeDragItem
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the method to be called when a booking item is resized.

Item Right Click Method

This user property is used to specify the method to be called when a user right-clicks a booking item.

Item Right Click Method	Description
Value	InvokeAssignItem

Item Right Click Method	Description
Parent Object Type	TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the method to be called when a user right-clicks a booking item.

Item Segment Left Click Methods

This user property is used to specify the method to be called when a user left-clicks an item segment.

Item Segment Left Click Methods	Description
Value	InvokeDrillDown;InvokeDrillDown;InvokeDrillDown;InvokeDrillDown
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the method to be called when a user left-clicks an item segment.

Item Time Dependency Fields

This user property is used to specify the field from which dependency item information is retrieved.

Item Time Dependency Fields	Description
Value	Absolute Set Up Date Time;Start Date Time;Absolute End Date Time;Absolute Tear Down Date Time
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the field from which dependency item information is retrieved.

Item Time Dependency Tooltip Fields

This user property is used to specify the field from which dependency ToolTip information is retrieved.

Item Time Dependency Tooltip Fields	Description
Value	Booking Dependency Tip;Booking Dependency Tip;Booking Dependency Tip;Booking Dependency Tip

Item Time Dependency Tooltip Fields	Description
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the field from which dependency ToolTip information is retrieved.

Item Time Display Toggle LOV Type

This user property is used to specify the list of values from which the name to be displayed on the booking item is retrieved.

Item Time Display Toggle LOV Type	Description
Value	TNT_SHM_GNTAX_FSD_DSP_TOGGLE
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the list of values from which the name to be displayed on the booking item is retrieved. This user property is used by the Display field in the applet.

Item Time Display Toggle Time Label 0

This user property is used to display the Function Name on the booking item.

	Desription
Value	Function Name Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to display the Function Name on the booking item.

Item Time Display Toggle Time Label 1

This user property is used to display the Function Type on the booking item.

Value	Function Type Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to display the Function Type on the booking item.

Item Time Display Toggle Time Label 2

This user property is used to display the Meal Period on the booking item.

Value	Meal Period Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to display the Meal Period on the booking item.

Item Time Display Toggle Time Label 3

This user property is used to display the Business Type on the booking item.

Value	Business Type Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to display the Business Type on the booking item.

Item Time Display Toggle Time Label 4

This user property is used to display the Quote Name on the booking item.

Value	Quote Name Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to display the Quote Name on the booking item.

Item Time Display Toggle Time Label 5

This user property is used to display the Setup Style on the booking item.

Value	Setup Style Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to display the Setup Style on the booking item.

Item Time Display Toggle Time Label 6

This user property is used to display the Function Status on the booking item.

Value	Function Status Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to display the Function Status on the booking item.

Item Time Display Toggle Time Label 7

This user property is used to display the Event Manager Name on the booking item.

Value	Event Manager Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to display the Event Manager Name on the booking item.

Item Time Display Toggle Time Label 8

This user property is used to display the Sales Manager Name on the booking item.

Value	Sales Manager Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to display the Sales Manager Name on the booking item.

Item Time Display Toggle Time Label 10

This user property is used to display the Account Name on the booking item.

Value	Account Name Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary
Usage	This user property is used to display the Account Name on the booking item.

Item Time Display Toggle Time Label 12

This user property is used to display the Function Start Date on the booking item.

Value	Function Start Date Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary
Usage	This user property is used to display the Function Start Date on the booking item.

Item Time Display Toggle Time Label 13

This user property is used to display the Function Day on the booking item.

Value	Function Day Calculated
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary
Usage	This user property is used to display the Function Day on the booking item.

Item Time Display Toggle Time Label 17

This user property is used to display the Inventory Status on the booking item.

Value	Inventory Status Calculated
Parent Object Type	TNT SHM Compact Function Space Diary
Usage	This user property is used to display the Inventory Status on the booking item.

Item Time Display Toggle Time Tooltip 0

This user property is used to specify the ToolTips to be displayed on the booking item.

Value	Booking Set Up Tip;Booking Tip - Function Name;Booking Tear Down Tip;Booking Tear Down Tip

Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the ToolTips to be displayed on the booking item.

Item Time Display Toggle Time Tooltip 1

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Function Type;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Display Toggle Time Tooltip 2

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Meal Period;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Display Toggle Time Tooltip 3

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Business Type;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Display Toggle Time Tooltip 4

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Quote Name;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Display Toggle Time Tooltip 5

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Setup Style;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Display Toggle Time Tooltip 6

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Function Status;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Display Toggle Time Tooltip 7

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Event Manager;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Display Toggle Time Tooltip 8

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Sales Manager;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Display Toggle Time Tooltip 17

This user property is used to specify the ToolTips to be displayed for the function space booking item.

Value	Booking Set Up Tip;Booking Tip - Function Name;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary
Usage	This user property is used to specify the ToolTips to be displayed for the function space booking item.

Item Time Fields

This user property is used to specify the fields for booking item segments.

Value	Absolute Set Up Date Time;Start Date Time;Absolute End Date Time;Absolute Tear Down Date Time
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the fields for booking item segments.

Item Time Ineffective Tooltip Fields

This user property is used to specify the ToolTips to be displayed the function space is ineffective.

Value	Ineffective Tip;Ineffective Tip;Ineffective Tip;Ineffective Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTips to be displayed the function space is ineffective.

Item Time Unavailable Tooltip Fields

This user property is used to specify the ToolTip information to be displayed when the function space is unavailable during the specified time.

Value	Unavailable Tip;Unavailable Tip;Unavailable Tip;Unavailable Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the ToolTip information to be displayed when the function space is unavailable during the specified time.

Item Tooltip Fields

This user property is used to specify the ToolTips to be displayed when the mouse hovers over each of the booking item segments.

Value	Booking Set Up Tip;Booking Tip - Function Name;Booking Tear Down Tip;Booking Tear Down Tip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the ToolTips to be displayed when the mouse hovers over each of the booking item segments, such as setup time, function name, and teardown time.

Item Type Field

This user property is used to specify the field from which the booking type is retrieved.

Value	Booking Type
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the field from which the booking type is retrieved.

Item Unavailable Color Field

This user property is used to specify the field from which the color for unavailable status is retrieved.

Value	Booking Type
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the field from which the color for unavailable status is retrieved.

Number of Rows to Overlap

This user property is used to control how many function spaces from the previous set are displayed in the next set.

Value	1
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary
Usage	When a user navigates to the next set of function spaces, the last function space in the previous set is displayed as the first item in the next set. This user property is used to control how many function spaces from the previous set are displayed in the next set.

Parent BC Date Context Field

This user property is used to specify the Start Date search criteria to be shared among the Function Space Diary pages.

Value	Search Sleeping Room Date
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Setup Style, TNT SHM Function Space Diary - Quote Name, TNT SHM SR Inventory Display Dync List Applet - Read Only, TNT SHM SR Inventory Display Dync List applet, TNT SHM SR Inventory Display Dync List Applet - Total Availability, TNT SHM SR Total Transient Avail Dync List Applet, TNT SHM SR Total Avail Room Specific Dync List Applet, TNT SHM Suite Total Avail Room Specific Dync List Applet, TNT SHM Sleeping Room Search Form Applet (No Product LOV), TNT SHM Function Space Inventory DyncPivot List Applet
Usage	This user property is used to specify the Start Date search criteria to be shared among the Function Space Diary pages. This field is in the parent business component (SHM Site), which allows child business components to share the Date context.

Sell Notes - Special Dates Business Component

This user property is used to specify the business component from which sell notes and special dates information is retrieved.

Value	TNT SHM Property Sell Note VBC
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the business component from which sell notes and special dates information is retrieved.

Sell Notes - Special Dates Popup Applet

This user property is used to specify the pop-up applet for sell notes and special dates.

Value	TNT SHM Property Sell Notes Popup Applet
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property is used to specify the pop-up applet for sell notes and special dates.

Sell Notes - Special Dates Start Date Field Name

This user property specifies the field name from which the sell notes and special dates start date is retrieved.

Value	Start Date
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style
Usage	This user property specifies the field name from which the sell notes and special dates start date is retrieved.

Slider Width(Height)

This user property is used to set the width of the slider.

Value	5
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category

	Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to set the width of the slider.

Start Date

This user property is used to retrieve the Start Date for the Function Space Diary.

Value	Start Date
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary
Usage	This user property is used to retrieve the Start Date for the Function Space Diary.

Time BC Start Time Field

This user property is used to specify the Start Date and Start Time for the Function Space Diary.

Value	Start Date Time
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the Start Date and Start Time for the Function Space Diary.

Time Business Component

This user property is used to specify the business component for the Gantt chart.

Value	TNT SHM Gantt AX Date Time Interval PopUp VBC
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the business component for the Gantt chart.

TNT CMT Same Time Frame - Show Move Popup Applet

This user property is used to controls whether or not to show the Move pop-up window in this applet when a booking is selected and (without releasing the selection) moved to a time where another booking already exists.

Value	Y
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary
Usage	Controls whether or not to show the Move pop-up window in this applet when a booking is selected and (without releasing the selection) moved to a time where another booking already exists. If the value of this user property is Y, the Move pop-up window is displayed. Otherwise, the Move pop-up window is not displayed.

Unavailable Field

This user property is used to retrieve information about whether or not a function space is unavailable.

Value	Is Unavailable Out of Order
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to retrieve information about whether or not a function space is unavailable.

X Axis Popup Height

This user property is used to set the height of the pop-up applet.

Value	450
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to set the height of the pop-up applet.

X Axis Popup Width

This user property is used to set the width of the pop-up applet.

Value	600
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to set the width of the pop-up applet.

X-Axis Background Color

This user property is used to set the background color of the x-axis (major and minor axis) of the Gantt chart.

Value	15790320
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to set the background color of the x-axis (major and minor axis) of the Gantt chart.

X-Axis Height

This user property is used to specify the height of the x-axis.

Value	40
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the height of the x-axis.

X-Axis Line Color

This user property is used to specify the line color for the x-axis.

Value	13421772
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the line color for the x-axis.

X-Axis Line Style

This user property is used to specify the line style of the x-axis.

Value	0
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the line style of the x-axis.

Y Axis Join Field

This user property is used to specify the link between the booking item and the specific space.

Value	Room Id
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the link between the booking item and the specific space.

Y-Axis Background Color

This user property is used to specify the background color for the y-axis of the Gantt chart.

Value	16777215;16777215;16777215;16777215
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the background color for the y-axis of the Gantt chart.

Y-Axis Business Component

This user property is used to specify the business component for the y-axis.

Value	TNT SHM Compact Room Rel VBC
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the business component for the y-axis.

Y-Axis Draw Sides

This user property is used to draw the sides of the y-axis with the specified values as the widths of the upper line, start line, lower line, and end line respectively.

Value	2;2;2;2
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to draw the sides of the y-axis with the specified values as the widths of the upper line, start line, lower line, and end line respectively.

Y-Axis Drilldown Index Field

This user property is used to specify the index field for the y-axis drill-down destination.

Value	Drilldown Index Field

Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the index field for the y-axis drill-down destination.

Y-Axis Drilldown Src Field Substitutes

This user property is used to specify the y-axis drill-down destination fields.

Value	Category Space Drilldown;Room Property Id;Specific Space Drilldown;Room Property Id
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the y-axis drill-down destination fields.

Y-Axis Header Background Color

This user property is used to set the background color for the y-axis header.

Value	15790320
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to set the background color for the y-axis header.

Y-Axis Header Label Text

This user property is used to specify the label text for the y-axis header.

Value	Specific Space
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space

	Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the label text for the y-axis header.

Y-Axis Header Line Color

This user property is used to specify the color of the y-axis header line.

Value	13421772
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the color of the y-axis header line.

Y-Axis Header Line Style

This user property is used to specify the line style of the y-axis header.

Value	0
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the line style of the y-axis header.

Y-Axis Hierarchy

This user property is used to display the individual specific spaces in the function space category.

Value	Y
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category

	Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	Function space categories are displayed in tree format on the y-axis. To display the individual specific spaces in the category, set this user property value to Y.

Y-Axis Hierarchy Drilldown Assignment

This user property is used to specify drill-down destinations for the y-axis hierarchy.

Value	Specific Space Drilldown;Category Space Drilldown
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify drill-down destinations for the y-axis hierarchy. The first value is for specific space drill-down destinations and the second value is for category drill-down destinations.

Y-Axis Item Dimensions

This user property is used to set the dimensions of the y-axis item.

Value	0;20;40;520
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to set the dimensions of the y-axis item.

Y-Axis Item Fields

This user property is used to specify the fields for the icons on the y-axis.

Value	Room Backup Required Id;Hierarchy Bitmap Id;Room Name Display;Room Name Display
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart

	Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	Each y-axis item is divided into four parts, which are Backup Required icon, Hierarchy icon, Function Space label, and another label. This user property is used to specify the fields for the icons on the y-axis.

Y-Axis Item Font Colors

This user property is used to set the font colors for y-axis items (function spaces).

Value	13408614;13408614;13408614;13408614
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to set the font colors for y-axis items (function spaces).

Y-Axis Item Icons

This user property is used to specify the icon Ids for y-axis items.

Value	207;206;210;204
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the icon Ids for y-axis items such as Backup Required and so on.

Y-Axis Item Tooltip Fields

This user property is used to specify ToolTips to be displayed for y-axis items.

Value	;;Room ToolTip;Room ToolTip
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category

	Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify ToolTips to be displayed for y-axis items.

Y-Axis Item Types

This user property is used to specify the icon types for y-axis items.

Value	GIcon;GIcon;GLbl;GLbl
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the icon types for y-axis items.

Y-Axis Left Click Methods

This user property is used to specify the method to be called when a user left-clicks a y-axis item.

Value	;InvokeToggleChildren;InvokeDrillDown;
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the method to be called when a user left-clicks a y-axis item.

Y-Axis Line Color

This user property is used to set the line color on the y-axis.

Value	13421772;13421772;13421772;13421772
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet

Usage	This user property is used to set the line color on the y-axis.

Y-Axis Line Style

This user property is used to set the line style on the y-axis.

Value	0;0;0;0
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Function Space Diary - Business Type, TNT SHM Function Space Diary - Function Type, TNT SHM Function Space Diary - Meal Period, TNT SHM Function Space Diary - Quote Name, TNT SHM Function Space Diary - Setup Style, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to set the line style on the y-axis.

Y-Axis Line Width

This user property is used to specify the line width on the y-axis.

Value	1;1;1;1
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet, TNT SHM Order Item Category Inventory Availability Gantt Chart Applet, TNT SHM Order Item Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Category Inventory Availability Gantt Chart Applet, TNT SHM Quote Item Inventory Availability Gantt Chart Applet
Usage	This user property is used to specify the line width on the y-axis.

Y-Axis Row Type Field

This user property is used to specify the type of the y-axis row.

Value	Room Type
Parent Object Type	TNT SHM Compact Function Space Diary, TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet
Usage	This user property is used to specify the type of the y-axis row.

Y-Axis Width

This user property is used to specify the width of the Y-axis.

Value	Function Space Column Size
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property specifies the width of the Y-axis. The value of this user property is a column name in the User Preferences business component. This allows users to set their preferences for Y-axis width in the User Preferences screen.

Business Component User Properties for Function Space Diary

This topic describes the following business component user properties:

- *Color Code Holiday Type*
- *Color Code Sell Note Type*
- *Color Code Special Events Type*
- *Diary User Preferences Fields*
- *Enable Single Button Toggle*
- *Format Specifier Major*
- *Format Specifier Minor*
- *Gantt Prefix*
- *Include End Time in Label Major*
- *Method Name 1*
- *Parent Field 1*
- *Pivot 1 Type 0*
- *Pivot 1 Type 2*
- *Scale Unit Major*
- *Scale Unit Minor*
- *Segments Per Page Major*
- *Segments Per Page Minor*
- *Spl Date BC Description Field*
- *Spl Date BC End Date Field*
- *Spl Date BC Start Date Field*
- *Spl Date BC Type Field*
- *Status Color Scheme LIC*
- *Time Part BC Minor 3*
- *Time Part BC Minor Property Field*

- *Tool Tip Delimiter*
- *Undo Method Name 1*
- *Units Per Segment Major*
- *Units Per Segment Minor*
- *WithoutTentative:Field Name*
- *WithoutTentative:Status*
- *WithoutTentative:Undo Method Name*
- *WithTentative:Undo Method Name*

Color Code Holiday Type

Use this user property to define the type of special day to which the Holiday color code type is mapped in the Function Space Diary.

Value	Holiday
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Each color code type has a different color, and each color must be mapped to a particular special day type to identify those days in the Function Space Diary. The default value is Holiday, which is the LOV display value for Holiday in the Property Pricing Admin screen, Sell Notes view. The special day configurations for a property are defined in the Sell Notes view. In the Function Space Diary, the color coding is applied to the day columns, if they belong to any of the special days that are defined in the Sell Notes view.

Color Code Sell Note Type

Use this user property to define the type of special day to which the Sell Note color code type is mapped in the Function Space Diary.

Value	Sell Notes
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Each color code type has a different color, and each color must be mapped to a particular special day type to identify those days in the Function Space Diary. The default value is Sell Notes, which is the LOV display value for Sell Notes in the Property Pricing Admin screen, Sell Notes view. The special day configurations for a property are defined in the Sell Notes view. In the Function Space Diary, the color coding is applied to the day columns, if they belong to any of the special days that are defined in the Sell Notes view.

Color Code Special Events Type

Use this user property to define the type of special day to which the Special Events color code type is mapped in the Function Space Diary.

Value	Special Events
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Each color code type has a different color, and each color must be mapped to a particular special day type to identify those days in the Function Space Diary. The default value is Special Events, which is the LOV display value for Special Events in the Property Pricing Admin screen, Sell Notes view. The special day configurations for a property are defined in the Sell Notes view. In the Function Space Diary, the color coding is applied to the day columns, if they belong to any of the special days that are defined in the Sell Notes view.

Diary User Preferences Fields

Use this user property to retrieve the user preferences defined in the User Preferences screen, Function Space Diary view. When a user navigates to Function Space Diary, the view is displayed with these predefined attributes.

Value	Time Scale Text;Display Toggle - Query;Toggle TurnTime - Query;Configured Space Pattern
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Retrieves the user preferences defined in the User Preferences screen, Function Space Diary view. When a user navigates to the Function Space Diary, the view is displayed with these predefined attributes. The values correspond to the Time Scale, Display, Turn Time, and Config Space Pattern controls in the Function Space Diary view. For these controls, a user can enter values in the User Preferences view, which are set as the default values for the controls in the Function Space Diary view. These user preferences are captured through the Time Scale Text, Display Toggle - Query, Toggle TurnTime - Query, and Configured Space Pattern fields of the User Preferences business component. These fields are prefixed with Diary/, for example, Diary/Time Scale Text.

Enable Single Button Toggle

Use this user property to enable or disable the toggle button click functionality.

Value	Y
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	Turns the toggle button click functionality on or off. If the value is Y, the dynamic applet of the toggle button can support toggle button functionality.

Format Specifier Major

This user property is used to specify the date format on the major axis for each time scale. Use this user property to define the date formats for different time scales on the major axis of the Function Space Diary.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;MMMM YYYY;2;DDDD DD;4;DDDD DD;8;DDDD DD;16;DDDD DD;32;MMMM YYYYY;64;DDD;128;DDD DD;256;DDD DD
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;MMMM YYYY;2;MMMM DD YYYY;4;DDDD MMMM DD YYYY;8;DDDD MMMM DD YYYY;16;DDDD MMMM DD YYYY;32;MMMM YYYYY
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;MMMM YYYY;2;MMMM DD YYYY;4;DDDD MMMM DD YYYY;8;DDDD MMMM DD YYYY;16;DDDD MMMM DD YYYY;32;MMMM YYYYY
Usage	Multiple time scales are available for user selection. Each time scale is referenced by a code, as follows:		
	Time Scale	**Code**	
	Week/Day	1	
	Day/Day-Part	2	
	Day/Hour	4	
	Day/Half-Hour	8	
	Day/Quarter-Hour	16	
	Month/Day-of-Week	32	
	Month/Day	64	
	Week/Day/Day-Part	128	
	Month/Day-of-Week/Day-Part	256	
	This user property is used to specify the date format on the major axis for each time scale. This user property determines the date formats for the major axis of the Function Space Diary, for example, August 2008. The value is a set of name-value pairs. The first part of the delimiter represents the time scale, and the second part represents the format that applies to the time scale.		

Format Specifier Minor

This user property is used to specify the date format on the minor axis for each time scale. Use this user property to define the date formats for different time scales on the minor axis of the Function Space Diary.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;DDD DD;2;DD h:m p;4;h p;8;h:m p;16;h:m p;32;DDDD DD;64;DD;128;DD h:m p;256;DD h:m p

Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;DDDD MMMM DD;2;DD h:m p;4;h p;8;h:m p;16;h:m p;32;DDDD DD
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;DDDD MMMM DD;2;DD h:m p;4;h p;8;h:m p;16;h:m p;32;DDDD DD
Usage	Multiple time scales are available for user selection. Each time scale is referenced by a code, as follows.		
	Time Scale	**Code**	
	Week/Day	1	
	Day/Day-Part	2	
	Day/Hour	4	
	Day/Half-Hour	8	
	Day/Quarter-Hour	16	
	Month/Day-of-Week	32	
	Month/Day	64	
	Week/Day/Day-Part	128	
	Month/Day-of-Week/Day-Part	256	
	This user property is used to specify the date format on the minor axis for each time scale. This user property determines the date formats for the minor axis of the Function Space Diary, for example, August 2008. The value is a set of name-value pairs. The first part of the delimiter represents the time scale, and the second part represents the format that applies to the time scale.		

Gantt Prefix

Use this user property to get an expression and set the expression as the named search specification for the TNT SHM Function Booking VBC business component.

Value	GntAX Func Stat:
Parent Object Type	TNT SHM Gantt AX Admin Function Status Color business component
Usage	The value of this user property is used as a prefix along with Status value of the function. The concatenated value is stored in the system preferences under the Name column.

	This user property is also used in C++ code in conjunction with the *Status Color Scheme LIC* user property to identify the color coding needed to display bookings, as defined by the function booking color scheme selection in the Function Space Diary screen.

Include End Time in Label Major

This user property is used to specify whether or not a time interval is displayed on the major axis, for each time scale.

Value	1;Y;2;N;4;N;8;N;16;N;32;Y;64;N
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC
Usage	This user property is used to specify whether or not a time interval is displayed on the major axis, for each time scale. An example time interval is January 2012 to February 2012. If a value is set to N, only the start date is displayed on the major axis.

Method Name 1

Use this user property to call a method when a user clicks the custom toggle button in the applet that is based on the TNT SHM SR Inventory Dync business component.

Value	WithoutTentative
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property is used when a custom toggle button exists on an applet. This user property calls different methods. The methods called are based on the caption of the button. The value for this user property is a method name, which is called by default when a user clicks the custom toggle button on the applet. The method name becomes the caption for the button. The method name must be defined as a LOV value for the TNT_SHM_TOTAL_AVAILABILITY type.

Parent Field 1

Use this user property to retrieve the required field values from the parent business component when a user double-clicks in the Function Space Diary.

Value	Id
Parent Object Type	SHM Site business component
Usage	Defines the business component from which to retrieve the required field values when a user double-clicks in the Function Space Diary. The default value is SHM Site, which is the parent business component of the Function Space Diary. When a user double-clicks in the Function Space Diary, this user property and other details are sent to the service method, which is configured in the OnDoubleClick Invoke Service Method user property.

Pivot 1 Type 0

In the applet that is based on the TNT SHM SR Inventory Dync business component, the exact quantity of blocked rooms is displayed under the Group Blocked heading.

Value	Group Blocked;1;Exact Blocked;1
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	Displays the aggregate value of the blocked sleeping rooms under the Group Blocked heading.

Pivot 1 Type 2

In the applet that is based on the TNT SHM SR Inventory Dync business component, the exact quantity of projected rooms is displayed under the Group Projected heading.

Value	Group Projected;1;Exact Projected;1
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	Displays the aggregate value of the projected sleeping rooms under the Group Projected heading.

Scale Unit Major

This user property is used to adjust the scaling factor on the major axis. Use this user property to define the scale unit of the major axis for different time scales in the Function Space Diary.

Value	1;0.25;2;1;4;0.5;8;4;16;7;32;1;64;1
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC, TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC, TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC
Usage	This user property is used to adjust the scaling factor on the major axis. This user property determines the scale unit of the major axis for different time scales in the Function Space Diary. The value is a set of name-value pairs. The first part of the delimiter represents the time scale, and the second part represents the unit scale of the major axis.

Scale Unit Minor

This user property is used to adjust the scaling factor on the minor axis. Use this user property to define the scale unit of the minor axis for different time scales in the Function Space Diary.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;1;2;1;4;.75;8;1;16;2;32;1;64;1;128;1;256;1

Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;1.5;2;1;4;1;8;4;16;7;32;1
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;1.5;2;1;4;1;8;4;16;7;32;1
Usage	This user property is used to adjust the scaling factor on the minor axis. This user property determines the scale unit of the minor axis for different time scales in the Function Space Diary. The value is a set of name-value pairs. The first part of the delimiter represents the time scale, and the second part represents the unit scale of the minor axis.		

Segments Per Page Major

This user property is used to specify the number of segments per page to be displayed on the major axis, for each time scale. Use this user property to define the segments per page of the major axis for different time scales in the Function Space Diary.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;1;2;1;4;1;8;1;16;1;32;2;64;30;128;8;256;8
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;1;2;1;4;1;8;1;16;1;32;1
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;1;2;1;4;1;8;1;16;1;32;1
Usage	This user property is used to specify the number of segments per page to be displayed on the major axis, for each time scale. This user property determines the segments per page of the major axis for different time scales in the Function Space Diary. The value is a set of name-value pairs. The first part of the delimiter represents the time scale, and the second part represents the segments per page for the major axis.		

Segments Per Page Minor

This user property is used to specify the number of segments per page to be displayed on the minor axis, for each time scale. Use this user property to define the segments per page of the minor axis for different time scales in the Function Space Diary.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;8;2;1;4;24;8;24;16;48;32;8;64;30;128;8;256;8
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;7;2;1;4;24;8;48;16;96;32;4
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;7;2;1;4;24;8;48;16;96;32;4
Usage	This user property is used to specify the number of segments per page to be displayed on the minor axis, for each time scale. This user property determines the segments per page of the minor axis for		

	different time scales in the Function Space Diary. The value is a set of name-value pairs. The first part of the delimiter represents the time scale, and the second part represents the segments per page for the minor axis.

Spl Date BC Description Field

Use this user property to retrieve the description for a special day and display the description in a tooltip in the Function Space Diary.

Value	Description
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Retrieves the description value for a special day and displays the description in a tooltip in the Function Space Diary. The default value is Description, which is the field name of the TNT SHM Property Special Dates Action business component, which in turn is defined for the Special Date BC Name user property. The value can also be mapped to any field other than Description that acts as a descriptive field for the TNT SHM Property Special Dates Action business component.

Spl Date BC End Date Field

Use this user property to retrieve the end date or expiration date for special days.

Value	End Date
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Retrieves the end or expiration date value for defined special days. The Start Date and End Date of the special days are used in C++ code to determine whether or not the date column in the Function Space Diary lies within the date range of any special day. If it does, then the color code or icon of the special day is displayed on that date column in the Function Space Diary. The default value is End, which is the field name of the TNT SHM Property Special Dates Action business component, which in turn is defined for the Special Date BC Name user property. The value can also be mapped to any field other than End that acts as an expiration date for the TNT SHM Property Special Dates Action business component.

Spl Date BC Start Date Field

Use this user property to retrieve the start date for special days.

Value	Start Date
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component

Usage	Retrieves the Start Date value for defined special days. The Start Date and End Date of the special days are used in C++ code to determine whether or not the date column in the Function Space Diary lies within any special day range. If it does, then the color code or icon of the special day is displayed on that date column in the Function Space Diary. The default value is Start, which is the field name of the TNT SHM Property Special Dates Action business component, which in turn is defined for the Special Date BC Name user property. The value can also be mapped to any field other than Start that acts as an expiration date for the TNT SHM Property Special Dates Action business component.

Spl Date BC Type Field

Use this user property to retrieve the types of special days.

Value	Type
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property is used to retrieve the special day type. This type determines the color code mechanism. The default value is Type, which is the field name of the TNT SHM Property Special Dates Action business component, which in turn is defined for the Special Date BC Name user property. The value can also be mapped to any field other than Type that acts as the type for the TNT SHM Property Special Dates Action business component.

Status Color Scheme LIC

Use this user property to indicate the LIC of the status for which toggle color codes are configured in the Function Space Administration screen.

Value	FUNCTION_STATUS
Parent Object Type	TNT SHM Gantt AX Admin Function Status Color business component
Usage	This user property is used in C++ code in conjunction with the *Gantt Prefix* user property to identify the color coding needed to display the bookings as defined by the function booking color scheme selection in the Function Space Diary screen. This is the LIC of the status in TNT_FSD_COLOR_SCHEMA.

Time Part BC Minor 3

Use this user property to retrieve the time part details for a property in the Function Space Diary.

Value	256;TNT SHM Property Day Part Pricing
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component

Usage	Usage of this user property is the same as *Time Part BC Minor*.

Time Part BC Minor Property Field

Use this user property to retrieve the Property Id for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component.

Value	Property Id
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Retrieves the Property Id for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component. The default value is Property ID, which is a field in the TNT SHM Property Day Part Pricing business component.

Tool Tip Delimiter

Use this user property to specify the delimiter for the tooltip in the Function Space Diary.

Value	:
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Separates the attribute names and values in the tooltip in the Function Space Diary. The default value is a colon (:).
Example	If the attribute name is Function Type and value is Board Meeting, then the tooltip stores this information as Function Type:Board Meeting.

Undo Method Name 1

Use this user property to call a method when a user clicks the custom toggle button in the applet that is based on the TNT SHM SR Inventory Dync business component.

Value	WithTentative
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property is used when a custom toggle button exists on an applet. The value of this user property represents the toggle method for the toggle button. When a user clicks the custom toggle button in the applet, the method that is configured for the Method Name 1 user property is called. Additionally, this method name WithTentative becomes the caption for the button. The method name must be defined as a LOV value for the TNT_SHM_TOTAL_AVAILABILITY type. When the user clicks the custom toggle button again, the method WithTentative is called.

Units Per Segment Major

This user property is used to specify the number of units per segment on the major axis.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;7;2;1;4;1;8;0.5;16;0.25;32;28;64;1;128;1;256;7
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;7;2;1;4;1;8;1;16;1;32;28
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;7;2;1;4;1;8;1;16;1;32;28
Usage	This user property is used to specify the number of units per segment on the major axis.		

Units Per Segment Minor

This user property is used to specify the number of units per segment on the minor axis.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;1;2;1;4;0.0416666666666666;8;0.02083333333333334;16;0.010416666666666666;32;7;64;1;128;1;256;7
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;1;2;1;4;0.0416666666666666;8;0.02083333333333333;16;0.010416666666666666;32;7
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;1;2;1;4;0.0416666666666666;8;0.02083333333333333;16;0.010416666666666666;32;7
Usage	This user property is used to specify the number of units per segment on the minor axis.		

WithoutTentative:Field Name

Use this user property to set the Boolean value of the field of the dependent TNT SHM Quote Room Block Line Items Aggr business component, to which the toggle method call is delegated.

Value	Tentative Flag
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	Sets the Boolean value of the field of the dependent TNT SHM Quote Room Block Line Items Aggr business component, to which the toggle method call will be delegated.

	The default value is Tentative Flag. When a user clicks the toggle button that displays a caption of Without Tentative, the Tentative Flag field of the TNT SHM Quote Room Block Line Items Aggr business component is set to True, and the aggregated records are prepared in the TNT SHM Quote Room Block Line Items Aggr business component.

WithoutTentative:Status

Use this user property to remove the records associated with the referenced status (T1 and T2) when a user clicks the toggle button that displays a caption of Without Tentative.

Value	T1;T2;
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	Removes the records associated with the referenced status (T1 and T2) when a user clicks the toggle button that displays a caption of Without Tentative. The aggregate records are processed in the TNT SHM Quote Room Block Line Items Aggr business component.

WithoutTentative:Undo Method Name

Use this user property to implement toggle functionality in a toggle button.

Value	WithTentative
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	Changes the caption of the toggle button when a user clicks the toggle button. The value is WithTentative. If a user clicks a toggle button with the caption WithoutTentative, the caption of the toggle button is replaced by WithoutTentative.

WithTentative:Undo Method Name

Use this user property to implement toggle functionality in a toggle button.

Value	WithoutTentative
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	Changes the caption of the toggle button when a user clicks the toggle button. The value is WithoutTentative. If a user clicks a toggle button with the caption WithTentative, the caption of the toggle button is replaced by WithoutTentative.

TNT SHM Gantt AX Date Time Interval PopUp Business Component User Properties

This topic describes the following user properties for the TNT SHM Gantt AX Date Time Interval PopUp business component of the Function Space Diary:

- *Activation Field 1*
- *Major Label Drilldown Name*
- *Minor Label Drilldown Name*
- *Minor Default Day Part Duration*
- *Minor Default Day Part Labels*
- *Time Part BC Minor*
- *Time Part BC Minor 2*
- *TNT CMT CI Property Field Name*

Activation Field 1

This user property is used to specify the fields to be activated.

Value	Go To
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC
Usage	This user property is used to specify the fields to be activated.

Value	Day/Hour
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC, TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC, TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC
Usage	This user property is used to specify the default time scale when the Function Space Diary is opened.

Major Label Drilldown Name

This user property is used to specify the drill-down destination for the label of the major axis, for each time scale. Use this user property to specify whether drilldown is enabled or disabled in the major label for each of the time scales.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;;2;Time Axis Item Drilldown;4;Time Axis Item Drilldown;8;Time Axis Item Drilldown;16;Time Axis Item Drilldown;32;64;;128;Time Axis Item Drilldown;256;Time Axis Item Drilldown

Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;;2;Time Axis Item Drilldown;4;Time Axis Item Drilldown;8;Time Axis Item Drilldown;16;Time Axis Item Drilldown;32;
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;;2;Time Axis Item Drilldown;4;Time Axis Item Drilldown;8;Time Axis Item Drilldown;16;Time Axis Item Drilldown;32;
Usage	This user property specifies whether drilldown is enabled or disabled in the major label for each of the time scales. This user property is also used to specify the drill-down destination for the label of the major axis, for each time scale.		

Minor Label Drilldown Name

Use this user property to specify whether drilldown is enabled or disabled in the minor label for each of the time scales. This user property is also used to specify the drill-down destination for the label of the minor axis, for each time scale.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	1;Time Axis Item Drilldown;2;;4;;8;;16;;32;Time Axis Item Drilldown;64;Time Axis Item Drilldown;128;;256;
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	1;Time Axis Item Drilldown;2;;4;;8;;16;;32;Time Axis Item Drilldown
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	1;Time Axis Item Drilldown;2;;4;;8;;16;;32;Time Axis Item Drilldown
Usage	This user property specifies whether drilldown is enabled or disabled in the minor label for each of the time scales. This user property is also used to specify the drill-down destination for the label of the minor axis, for each time scale.		

Minor Default Day Part Duration

This user property is used to set the default duration in minutes for day parts on the minor axis.

Value	0;660;900;1080
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC, TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC, TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC
Usage	This user property is used to set the default duration in minutes for day parts on the minor axis. The day parts are Morning, Lunch, Afternoon, and Evening.

Minor Default Day Part Labels

This user property is used to specify the default day part labels.

Value	Morning;Lunch;Afternoon;Evening
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC, TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC, TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC
Usage	This user property is used to specify the default day part labels.

Time Part BC Minor

This user property is used to specify the time scale for which the day parts are displayed. Use this user property to retrieve the time part details for a property in the Function Space Diary.

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC	**Value**	2;TNT SHM Property Day Part Pricing
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC	**Value**	2;TNT SHM Day Part Display
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC	**Value**	2;TNT SHM Day Part Display
Usage	This user property is used to specify the time scale for which the day parts are displayed. This user property retrieves the time part details for a property and indicates whether or not to display the time part details on the appropriate time scale in the Function Space Diary. For instance, the default value of TNT SHM Gantt AX Date Time Interval PopUp VBC is represented as follows: 2 is the LIC for the time scale in the Function Space Diary, and TNT SHM Property Day Part Pricing is the business component from which to get the time part details for a property.		

Time Part BC Minor 2

This user property is used to specify the time scale for which the day parts are displayed. Use this user property to retrieve the time part details for a property in the Function Space Diary.

Value	64;TNT SHM Day Part Display
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC
Usage	This user property is used to specify the time scale for which the day parts are displayed. Usage of this user property is the same as *Time Part BC Minor*.

TNT CMT CI Property Field Name

This user property is used to specify the field that displays whether the property is a SFA (Sales Force Automation) property or a CI (Consolidated Inventory) property.

Value	TNT CMT SFA CI Condition
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC, Quote, SHM Site
Usage	This user property is used to specify the field that displays whether the property is a SFA (Sales Force Automation) property or a CI (Consolidated Inventory) property.

User Properties for Sleeping Room Mapping

This topic describes the user properties supported for the Sleeping Room Mapping functionality of Siebel Hospitality. This topic covers the following subject:

- *Business Component User Properties for Sleeping Room Mapping*
- *Integration Object User Properties for Sleeping Room Mapping*

Business Component User Properties for Sleeping Room Mapping

This topic describes the following business component user properties:

- *Activation BC*
- *Activation Field 1*
- *Activation Field 2*
- *Activation Field 3*
- *Child BC*
- *TNT SHM Arrival Date Field*
- *TNT SHM Departure Date Field*
- *TNT SHM Number of Nights Field*
- *View Name*

Activation BC

This user property is used in C++ code to activate some of the fields of the SHM Site business component during the administration of sleeping room mapping.

Value	TNT Product - ISS Admin
Parent Object Type	SHM Site business component
Usage	The value of this user property is a business component name. This user property is used in C++ code to activate some of the fields in the SHM Site business component during the administration of sleeping room mapping.

Activation Field 1

This user property is used in C++ code to activate a defined field of the SHM Site business component, which is configured in the *Activation BC* user property during the administration of sleeping room mapping.

Value	TNT Capacity
Parent Object Type	SHM Site business component
Usage	The value of this user property is a business component name. This user property is used in C++ code to activate some of the fields in the SHM Site business component during the administration of sleeping room mapping.

Activation Field 2

This user property is used in C++ code to activate a defined field of the SHM Site business component, which is configured in the *Activation BC* user property during the administration of sleeping room mapping.

Value	Description
Parent Object Type	SHM Site business component
Usage	The value of this user property is a business component name. This user property is used in C++ code to activate some of the fields in the SHM Site business component during the administration of sleeping room mapping.

Activation Field 3

This user property is used in C++ code to activate a defined field of the SHM Site business component, which is configured in the *Activation BC* user property during the administration of sleeping room mapping.

Value	TNT CRS Code
Parent Object Type	SHM Site business component
Usage	The value of this user property is a business component name. This user property is used in C++ code to activate some of the fields in the SHM Site business component during the administration of sleeping room mapping.

Child BC

This user property is accessed in C++ code to specify the virtual child business component to be run at a specific view aspect that is set at the applet using the business component.

Value	TNT Mapped Specific Room

Parent Object Type	SHM Site business component
Usage	The value of this user property is a business component name. This user property is used in C++ code to activate some of the fields in the SHM Site business component during the administration of sleeping room mapping.

TNT SHM Arrival Date Field

Use this user property to set the correct value of the Calculated Arrival Date field on a change of duration (that is, a change to the value of the Num Nights Duration field) or a change to the closed date (that is, a change to the value of the Hospitality Close Date field).

Value	Calculated Arrival Date
Parent Object Type	Opportunity Home Add Virtual business component
Usage	The value of this user property is a business component field. When the Num Nights Duration field or the Hospitality Close Date field is updated, a new value for the Calculated Arrival Date field is calculated and set by way of C++ code.

TNT SHM Departure Date Field

Use this user property to set the correct value of the Calculated Arrival Date field on a change of duration (that is, a change to the value of the Num Nights Duration field) or a change to the arrival date (that is, a change to the value of the Calculated Arrival Date field).

Value	Hospitality Close Date
Parent Object Type	Opportunity Home Add Virtual business component
Usage	The value of this user property is a business component field. When the Num Nights Duration field or the Calculated Arrival Date field is updated, a new value for the Hospitality Close Date field is calculated and set by way of C++ code.

TNT SHM Number of Nights Field

Use this user property to set the correct value of the Num Nights Duration field on a change of arrival date (that is, a change to the value of the Calculated Arrival Date field) or a change to the closed date (that is, a change to the value of the Hospitality Close Date field).

Value	Num Nights Duration
Parent Object Type	Opportunity Home Add Virtual business component

Usage	The value of this user property is a business component field. When the Calculated Arrival Date field or the Hospitality Close Date field is updated, a new value for the Num Nights Duration field is calculated and set by way of C++ code.

View Name

This user property is accessed in C++ code to enable the specialized behavior of the business component that is defined in the *Child BC* user property.

Value	TNT Generic Room Type Mapping View
Parent Object Type	TNT Mapped Specific Room business component
Usage	This user property is accessed in C++ code to enable the specialized behavior of the business component that is defined in the *Child BC* user property.

Integration Object User Properties for Sleeping Room Mapping

This topic describes the following integration object user property:

- *Date XMLTag Name*

Date XMLTagName

Use this user property to decide whether or not to create a quote from an opportunity for a property when the opportunity for a property does not have user-defined dates.

Value	ListOfTNT SHM Property Dates
Parent Object Type	TNT SHM Multiple Dates integration object
Usage	Varies depending on whether the user property is active or inactive, as follows: • If this user property is active, then a quote is created for an opportunity for a property even if the opportunity does not have a user-defined date range. In this case, the generated quote has, as a date range, the Arrival Date and Departure Date of the opportunity. • If this user property is inactive, then a quote is not created for an opportunity for a property if that opportunity does not have a user-defined date range.

User Properties for Menus and Packages

This topic describes the user properties supported for the Menus and Packages functionality of Siebel Hospitality. This topic covers the following subjects:

- *Applet User Properties for Menus and Packages*
- *Business Component User Properties for Menus and Packages*

Applet User Properties for Menus and Packages

This topic describes the following applet user properties:

- *BC Field Search LHS*
- *BC Field Search LHS 1*
- *BC Field Search LHS 2*
- *CanInvokeMethod: NavigateToView*
- *CanInvokeMethod: CopyRecord*
- *Double Click Applet Method*
- *Effective Dates Constraint BC*
- *Enter Key Method*
- *Mode*
- *Mode*
- *Named Method: CreateMenuPackages*
- *Named Method: NavigateToView*
- *Named Method: QuickAddItem*
- *Parent BC Constraint Field*
- *Parent BC Constraint Field 1*
- *Parent BC Constraint Field 2*
- *Popup*
- *Popup*
- *Popup*
- *Popup Dimension*
- *Popup Dimension*
- *Product Search Fields*
- *Search Spec Condition BC*

BC Field Search LHS

Use this user property with the *Parent BC Constraint Field* user property to form the search specification for the TNT Property Substitute Product Assoc Applet applet. The search specification is formed according to the sequence of the BC Field Search LHS xx and Parent BC Constraint Field xx user properties, where *xx* indicates 0,1,2,3,...

Value	Vendor Id =
Parent Object Type	TNT Property Substitute Product Assoc Applet applet
Usage	Use this user property to format the search specification for the TNT Property Substitute Product Assoc Applet applet. This user property works with the *Parent BC Constraint Field* user property. This user property value acts as the LHS part of the search specification, and the value of the *Parent BC Constraint Field* user property acts as the RHS part of the search specification.

BC Field Search LHS 1

Use this user property with the *Parent BC Constraint Field 1* user property to form the search specification for the TNT Property Substitute Product Assoc Applet applet. The search specification is formed according to the sequence of the BC Field Search LHS xx and Parent BC Constraint Field xx user properties, where *xx* indicates 0,1,2,3,...

Value	Type =
Parent Object Type	TNT Property Substitute Product Assoc Applet applet
Usage	Use this user property to format the search specification for the TNT Property Substitute Product Assoc Applet applet. This user property works with the *Parent BC Constraint Field 1* user property. This user property value acts as the LHS part of the search specification, and the value of the *Parent BC Constraint Field 1* user property acts as the RHS part of the search specification.

BC Field Search LHS 2

Use this user property with the *Parent BC Constraint Field 2* user property to form the search specification for the TNT Property Substitute Product Assoc Applet applet. The search specification is formed according to the sequence of the BC Field Search LHS xx and Parent BC Constraint Field xx user properties, where *xx* indicates 0,1,2,3,...

Value	Id <>
Parent Object Type	TNT Property Substitute Product Assoc Applet applet
Usage	Use this user property to format the search specification for the TNT Property Substitute Product Assoc Applet applet. This user property works with the *Parent BC Constraint Field 2* user property. This user property value acts as the LHS part of the search specification, and the value of the *Parent BC Constraint Field 2* user property acts as the RHS part of the search specification.

CanInvokeMethod: NavigateToView

Use this user property to enable or disable the NavigateToView method.

Value	[Id] IS NOT NULL
Parent Object Type	TNT SHM Function Line Items List Applet applet

Usage	Enables or disables the NavigateToView method. The value shows that when no records are displayed in the parent applet, the NavigateToView method is disabled.

CanInvokeMethod: CopyRecord

Use this user property to disable the Copy Record functionality in Menu Administration, Event Order Item Administration, and Package & Specific Space Administration.

The user property for the TNT SHM FSI Sleeping Room List Applet applet, which is enabled in the *Oracle's Siebel CRM base application* (the functionality that is common to Oracle's Siebel Business Applications that are not industry-specific), is disabled in Siebel Hospitality to resolve a visibility issue.

Value	N
Parent Object Type	TNT Property Product Admin List Applet, TNT Package Administration List Applet, TNT Menu Administration List Applet, and TNT SHM FSI Sleeping Room List Applet applets
Usage	Due to some technical constraints in Administration - Product, you must disable the Copy Record functionality in Menus and Packages-related administration views in order to release a copied product.

Double Click Applet Method

Use this user property to specify the method to call on a double-click event.

Value	AddProducts
Parent Object Type	TNT Menu Product Pick Applet applet, TNT Package Product Pick Applet applet
Usage	When a user double-clicks one of the parent objects, the selected record is added to its originating or parent applet. The value of this user property is AddProducts, which is a custom method. If you do not use the double-click event, this user property can be deactivated.

Effective Dates Constraint BC

Use this user property to constrain records in parent object applets by getting effective date details from the active business component.

This user property exists in the Siebel CRM base application. In Siebel Hospitality, the value Internal Product - ISS Admin is replaced with TNT Product - ISS Admin for Menus and Packages to resolve a visibility issue.

Value	TNT Product - ISS Admin
Parent Object Type	TNT SHM FSI Function Space Assoc List Applet and TNT SHM FSI Indivisible Space Assoc List Applet applets

Usage	Constrains records in parent object applets by getting effective date details from the active business component.

Enter Key Method

Use this user property to specify the Quick Add functionality that operates when a user clicks the Enter button.

Value	Search
Parent Object Type	TNT Attribute Search Applet applet
Usage	Specifies the Quick Add functionality that operates when a user clicks the Enter button.

Mode

Use this user property to display the pop-up applet in edit mode.

Value	Edit
Parent Object Type	TNT Check Spelling control in TNT Menu Administration List Applet, TNT Package Administration List Applet and TNT Property Product Admin List Applet applets
Usage	Specifies that when a user clicks the Check Spelling button, the pop-up Applet is displayed in edit mode.

Mode

Use this user property to display the pop-up applet in edit list mode.

Value	Edit List
Parent Object Type	AddItem control in TNT Menu Item List Applet, TNT Package Item List Applet applet
Usage	Specifies that when a user clicks the Add Items button, the pop-up applet is displayed in edit list mode.

Named Method: CreateMenuPackages

Use this user property to call the Show Popup method when a user chooses the Create Custom Menu/Package applet menu item.

Value	'INVOKE', 'ShowPopup', '"TNT Custom Menu/Package Popup Applet"', 'Edit'

Parent Object Type	TNT SHM Function Line Items List Applet - Function, TNT SHM Function Line Items List Applet, TNT SHM Order Line Item List Applet applets
Usage	Calls the Show Popup method when a user chooses the Create Custom Menu/Package applet menu item.

Named Method: NavigateToView

Use this user property to navigate to another view with search or sort specifications.

Value	"INVOKESVC", "TNT SHM Workflow UI Service", "GotoView", "'View'", "'TNT SHM Category Line Items View'", "'Sort Spec'", "'TNT Grouping'", "'Search Spec'", "[TNT MM Search Spec]", "'Business Component'", "'''", "'Row Id'", "'''"
Parent Object Type	TNT SHM Function Line Items List Applet applet
Usage	Navigates to another view with search or sort specifications. By default, the destination view is TNT SHM Category Line Items View, which is defined after the View parameter.

Named Method: QuickAddItem

Use this user property to call the business service method when a user clicks the Quick Add button to add an entered item to the function line items.

Value	"INVOKESVC", "TNT Utility Service", "QuickAdd"
Parent Object Type	TNT Quote Catalog Quick Add Form Applet applet
Usage	Calls the business service method when a user clicks the Quick Add button to add an entered item to the function line items.

Parent BC Constraint Field

Use this user property with the *BC Field Search LHS* user property to form the search specification for the TNT Property Substitute Product Assoc Applet applet.

Value	Vendor Id
Parent Object Type	TNT Property Substitute Product Assoc Applet applet
Usage	See the usage of the *BC Field Search LHS* user property.

Parent BC Constraint Field 1

Use this user property with the *BC Field Search LHS 1* user property to form the search specification for the TNT Property Substitute Product Assoc Applet applet.

Value	Type
Parent Object Type	TNT Property Substitute Product Assoc Applet applet
Usage	See the usage of the *BC Field Search LHS 1* user property.

Parent BC Constraint Field 2

Use this user property with the *BC Field Search LHS 2* user property to form the search specification for the TNT Property Substitute Product Assoc Applet applet.

Value	Id
Parent Object Type	TNT Property Substitute Product Assoc Applet applet
Usage	See the usage of the *BC Field Search LHS 2* user property.

Popup

Use this user property to specify the pop-up Applet to be displayed when a user clicks the Check Spelling button.

Value	Spell Checker Popup Applet
Parent Object Type	TNT Check Spelling control in TNT Menu Administration List Applet, TNT Package Administration List Applet and TNT Property Product Admin List Applet applets
Usage	Specifies the pop-up Applet to be displayed when a user clicks the Check Spelling button.

Popup

Use this user property to specify the popup applet that is displayed when a user clicks the Add Items button.

Value	TNT Menu Product Pick Applet
Parent Object Type	AddRecord control in TNT Menu Item List Applet applet
Usage	Specifies the popup applet that is displayed when a user clicks the Add Items button.

Popup

Use this user property to specify the popup applet that is displayed when a user clicks the Add Items button.

Value	TNT Package Product Pick Applet
Parent Object Type	AddRecord control in TNT Package Item List Applet applet
Usage	Specifies the popup applet that is displayed when a user clicks the Add Items button.

Popup Dimension

Use this user property to specify the dimensions of the pop-up applet that is displayed when a user clicks the Check Spelling button.

Value	400 X 550
Parent Object Type	TNT Check Spelling control in TNT Menu Administration List Applet, TNT Package Administration List Applet and TNT Property Product Admin List Applet applets
Usage	Specifies the dimensions of the pop-up applet that is displayed when a user clicks the Check Spelling button.

Popup Dimension

Use this user property to specify the dimensions of the pop-up applet that is displayed when a user clicks the Add Items button.

Value	500 X 600
Parent Object Type	AddRecord control in TNT Menu Item List Applet, TNT Package Item List Applet applets
Usage	Specifies the dimensions of the pop-up applet that is displayed when a user clicks the Add Items button.

Product Search Fields

Use this user property to specify the Product fields in which a user can search using the Quick Add view.

Value	Name, Product Type, TNT Display Name, TNT Unit of Measure, Part #, SHM Sub Category, Grouping Code, SHM Category, TNT Report Header, SHM Parent Category
Parent Object Type	TNT Attribute Search Applet applet

Usage	Specifies the Product fields on which a search can be done in the Quick Add view.

Search Spec Condition BC

Use this user property to constrain records in parent object applets by applying a formed search specification to the active business component.

This user property exists in the Siebel CRM base application. In Siebel Hospitality, the value Internal Product - ISS Admin is replaced by TNT Product - ISS Admin for Menus And Packages to resolve a visibility issue.

Value	TNT Product - ISS Admin
Parent Object Type	TNT SHM FSI Function Space Assoc List Applet applet
Usage	Constrains records in parent object applets by applying a formed search specification to the active business component.

Business Component User Properties for Menus and Packages

This topic describes the following business component user properties:

- *AddToCart Proxy Buscomp2*
- *Aspect Default Value: Menu*
- *Aspect Default Value: Menu*
- *Aspect Default Value: MenuEventItem*
- *Aspect Default Value: Package*
- *Aspect Default Value: Package*
- *CanInvokeCustomMethod 1*
- *CanInvokeCustomMethod 2*
- *Deep Copy*
- *Deep Copy*
- *Deep Copy*
- *Field Name: IsExtendedQuantity*
- *Field Name: IsMenuPackageType*
- *Field Name: TNT TaxRequired Flag*
- *Field Name: TNT TopLevelParentFlag*
- *Field Name: TNT TopLevelParentPIP*
- *Field Read Only Field: Product*
- *IsParentMPTypeField*
- *Line Items BC Name: Quote*
- *Line Items BC Name: TNT Function Line Item Quick Entry View*

- *Line Items BC Name: TNT SHM Function*
- *Line Items BC Name: TNT SHM Order Entry*
- *Line Items BC Name: TNT SHM Order Function Line Items View*
- *Line Items BC Name: TNT SHM Quote Function Line Items View*
- *Line Items BO Name: Quote*
- *Line Items BO Name: SHM Invoice*
- *Line Items BO Name: TNT SHM Function*
- *Line Items BO Name: TNT SHM Order Entry*
- *Line Items BO Name: TNT SHM Templates*
- *Menu Item Field Map 1*
- *Named Method*
- *Named Method 1*
- *Named Method 4*
- *Named Method 7*
- *Named Method 8*
- *Named Method 8*
- *Named Method 9*
- *Named Method 10*
- *Named Method 11*
- *Named Method 13*
- *Named Method 14*
- *Named Method 15*
- *Named Method 15*
- *Named Method 16*
- *Named Method 17*
- *Named Method 17*
- *Named Method 18*
- *Named Method 19*
- *Named Method 21*
- *Named Method 22*
- *On Field Update Invoke*
- *On Field Update Invoke*
- *On Field Update Invoke*
- *On Field Update Invoke*
- *On Field Update Invoke 1*
- *On Field Update Invoke 1*
- *On Field Update Invoke 1*
- *On Field Update Invoke 1*
- *On Field Update Invoke 10*

- *On Field Update Invoke 11*
- *On Field Update Invoke 12*
- *On Field Update Invoke 13*
- *On Field Update Invoke 13*
- *On Field Update Invoke 14*
- *On Field Update Invoke 15*
- *On Field Update Set 10*
- *On Field Update Set 11*
- *On Field Update Set 47*
- *On Field Update Set 48*
- *Package Item Field Map 3*
- *Parent Item Product Type*
- *Parent Item Product Type*
- *Parent Pick Field*
- *Parent Product Type*
- *Parent Product Type*
- *Pick List SearchSpec:MenuEventItem*
- *Pick List SearchSpec:Package*
- *Prefix For Custom Product*
- *Product BC Name: TNT Function Line Item Quick Entry View*
- *Product BC Name: TNT SHM Order Function Line Items View*
- *Product BC Name: TNT SHM Quote Function Line Items View*
- *Recursive Link*
- *Revenue Adjusted Price Field*
- *Template Copy Fields*
- *TNT Allocation Validation Diff*
- *TNT Extended Net Price Flag*
- *TNT Item Price Field*
- *TNT Manual Allocation Field*
- *TNT MPType Flag*
- *TNT No Display Flag*
- *TNT SHM Line Item Total Field*
- *TNT SHM Line Item Total Field*

AddToCart Proxy Buscomp2

Use this user property to get the business component instance in C++ code to evaluate defined search criteria and search for items.

Value	Internal Product Popup

Parent Object Type	Quick Add business component
Usage	The value of this user property is business component. This user property gets the business component instance in C++ code to evaluate defined search criteria, search items, and add the selected items to the function line items.

Aspect Default Value: Menu

Use this user property to set the default Menu Per Person value for the Type field, if the TNT Product - ISS Admin business component is driven by the TNT Menu Administration List Applet applet.

Value	LookupValue ("PRODUCT_TYPE", "Menu Per Person")
Parent Object Type	Type Field in TNT Product - ISS Admin business component
Usage	The TNT Menu Administration List Applet applet has the Default Aspect user property and a value of Menu. If the TNT Product - ISS Admin business component is driven by the TNT Property Product Admin List Applet applet, the lookup value of Menu Per Person is set to the Type field as the default value.

Aspect Default Value: Menu

Use this user property to set the default value of Person to the Unit of Measure field, if the TNT Product - ISS Admin business component is driven by the TNT Menu Administration List Applet applet.

Value	LookupValue ("UNIT_OF_MEASURE", "Person")
Parent Object Type	Unit of Measure Field in TNT Product - ISS Admin business component
Usage	The applet TNT Menu Administration List Applet has the Default Aspect user property and a value of Menu. If the TNT Product - ISS Admin business component is driven by the TNT Menu Administration List Applet applet, the lookup value of the Unit of Measure field is set to Person as the default value.

Aspect Default Value: MenuEventItem

Use this user property to set the default current date C value for the Start Date field, if the TNT Product - ISS Admin business component is driven by the TNT Property Product Admin List Applet applet.

Value	Today()
Parent Object Type	Start Date Field in TNT Product - ISS Admin business component
Usage	The TNT Property Product Admin List Applet applet has the Default Aspect user property and a value of MenuEventItem. If the TNT Product - ISS Admin business component is driven by the TNT Property Product Admin List Applet applet, the current date is set to Type as the default value.

Aspect Default Value: Package

Use this user property to set the default value of the Start Date field to the current date, if the TNT Product - ISS Admin business component is driven by the TNT Package Administration List Applet applet.

Value	Today()
Parent Object Type	Start Date Field in TNT Product - ISS Admin business component
Usage	The TNT Package Administration List Applet applet has the Default Aspect user property and a value of Package. If the TNT Product - ISS Admin business component is driven by the TNT Property Product Admin List Applet applet, the default value of Type is set to the current date.

Aspect Default Value: Package

Use this user property to set the default value of the Unit of Measure field to Person, if the TNT Product - ISS Admin business component is driven by the TNT Package Administration List Applet applet.

Value	LookupValue ("UNIT_OF_MEASURE", "Person")
Parent Object Type	Unit of Measure Field in TNT Product - ISS Admin business component
Usage	The TNT Package Administration List Applet applet has the user property Default Aspect and a value of Package. If the TNT Product - ISS Admin business component is driven by the TNT Menu Administration List Applet applet, the default value of the Unit of Measure field is set to Person.

CanInvokeCustomMethod 1

Use this user property to enable or disable the Validate Allocation method.

Value	"ValidateAlloc", "IsIdNotNull"
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Enables or disables the Validate Allocation method. The first part of the value indicates the method name, and the second part of the value indicates a condition for enabling or disabling. By default, the condition indicates that a record must exist. This user property is applicable only for those business components that are based on the CSSBCSHMQuoteItem class.

CanInvokeCustomMethod 2

Use this user property to enable or disable the UseSysAlloc method.

Value	"UseSysAlloc", "TNT Use Sys Alloc Call Flag"
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Enables or disables the UseSysAlloc method. The first part of the value indicates the method name, and the second part of the value indicates a condition for enabling or disabling. The value of the TNT Use Sys Alloc Call Flag field determines if the UseSysAlloc method is enabled or disabled for users. This user property is applicable only for those business components that are based on the CSSBCSHMQuoteItem class; and the condition part must return either Y, y, N, or n.

Deep Copy

Use this user property to copy the child items in the menu or package when the parent menu or package is copied.

Value	TNT SHM Order Item
Parent Object Type	TNT SHM Order Item business component
Usage	Copies the child items in the menu or package when the parent menu or package is copied.

Deep Copy

Use this user property to copy the child items in the menu or package when the parent menu or package is copied.

Value	TNT SHM Quote Item
Parent Object Type	TNT SHM Quote Item business component
Usage	Copies the child items in the menu or package when the parent menu or package is copied.

Deep Copy

Use this user property to copy the child items in the menu or package when the parent menu or package is copied.

Value	TNT SHM Invoice Order Item
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Copies the child items in the menu or package when the parent menu or package is copied.

Field Name: IsExtendedQuantity

Use this user property to pass the field name to the C++ code.

Value	IsExtendedQuantity
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Passes the field name to the C++ code.

Field Name: IsMenuPackageType

Use this user property to pass the field name to the C++ code.

Value	TNT Extended Revenue Estimate Line Total - Display
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Passes the field name to the C++ code.

Field Name: TNT TaxRequired Flag

Use this user property to pass the field name to the C++ code.

Value	TNT TaxRequired Flag
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item, TNT SHM Order Item Copy business components
Usage	Passes the field name to the C++ code.

Field Name: TNT TopLevelParentFlag

Use this user property to pass the field name to the C++ code.

Value	TNT TopLevelParentFlag
Parent Object Type	TNT SHM Invoice Order Item, TNT SHM Order Item, TNT SHM Order Item Copy business components
Usage	Passes the field name to the C++ code.

Field Name: TNT TopLevelParentPIP

Use this user property to pass the field name to the C++ code.

Value	TNT TopLevelParentPIP
Parent Object Type	TNT SHM Invoice Order Item, TNT SHM Order Item, TNT SHM Order Item Copy business components
Usage	Passes the field name to the C++ code.

Field Read Only Field: Product

Use this user property to evaluate some conditions to make the Product field read only.

Value	TNT Product Read Only Flag
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	For a description of the usage of this user property, see the chapter on user properties in *Siebel Developer's Reference* . This user property is in the Oracle's Siebel CRM base application and is modified with more conditions for the Menus and Packages feature.

IsParentMPTypeField

Use this user property to specify the field name to determine if the parent line item is a Menu or Package Type.

Value	IsParentOrderItemMPType
Parent Object Type	TNT SHM Order Item, TNT SHM Invoice Order Item business components
Usage	A field name of the business component is passed as the value of this user property. This user property is used in C++ code to verify whether or not the function line item is a child item of a parent menu or package.

Line Items BC Name: Quote

Use this user property to get the appropriate business component instance in C++ code to create custom menus or packages in quote line items.

Value	TNT SHM Quote Item
Parent Object Type	TNT Custom Menu, Package VBC business component

Usage	Creating custom menus and packages is handled through C++ code, and it requires the appropriate business component to be retrieved. This user property is created with the business object. If the active business object is TNT SHM Quote, then the TNT SHM Quote Item business component instance is created in C++ code to create custom menus and packages.

Line Items BC Name: TNT Function Line Item Quick Entry View

Use this user property to retrieve the business component instance in C++ code while adding items to the function line items, using the Quick Add applet.

Value	TNT SHM Quote Item
Parent Object Type	Internal Product Popup, Quick Add business components
Usage	Retrieves the business component instance in C++ code while adding items to the function line items, using the Quick Add applet. The second part of the user property name designates the view context. If the active view is the TNT Function Line Item Quick Entry View view, then the TNT SHM Quote Item business component instance adds the items to the function line items.

Line Items BC Name: TNT SHM Function

Use this user property to get the appropriate business component instance in C++ code to create custom menus or packages in function line items.

Value	TNT SHM Function Item
Parent Object Type	TNT Custom Menu/Package VBC business component
Usage	Creating custom menus and packages is handled through C++ code, and it requires the appropriate business component to be retrieved. This user property is created with the business object. If the active business object is TNT SHM Function, then the TNT SHM Function Item business component instance is created in C++ code to create custom menus and packages.

Line Items BC Name: TNT SHM Order Entry

Use this user property to get the appropriate business component instance in VBC code.

Value	TNT SHM Order Item
Parent Object Type	TNT Custom Menu/Package VBC business component
Usage	Creating custom menus and packages is handled through C++ code, and it requires the appropriate business component to be retrieved. This user property is created with the business object. If the active business object is TNT SHM Order Entry, then the TNT SHM Order Entry Item business component instance is created in C++ code to create custom menus and packages.

Line Items BC Name: TNT SHM Order Function Line Items View

Use this user property to retrieve the business component instance in C++ code while adding items to the function line items, using the Quick Add applet.

Value	TNT SHM Order Item
Parent Object Type	Internal Product Popup, Quick Add business components
Usage	Retrieves the business component instance in C++ code while adding items to the function line items, using the Quick Add applet. The second part of the user property name designates the view context. If the active view is the TNT SHM Order Function Line Items view, then the TNT SHM Order Item business component instance adds the items to the function line items.

Line Items BC Name: TNT SHM Quote Function Line Items View

Use this user property to retrieve the business component instance in C++ code while adding items to the function line items, using the Quick Add applet.

Value	TNT SHM Quote Item
Parent Object Type	Internal Product Popup, Quick Add business components
Usage	Retrieves the business component instance in C++ code while adding items to the function line items, using the Quick Add applet. The second part of the user property name designates the view context. If the active view is the TNT SHM Quote Function Line Items view, then the TNT SHM Quote Item business component instance adds the items to the function line items.

Line Items BO Name: Quote

Use this user property to define a business object name to make technical decisions in C++ code.

Value	Quote
Parent Object Type	TNT SHM Quote Item business component
Usage	Defines the business object name to make technical decisions in C++ code. This user property is active only if the business component is associated with the defined business object.

Line Items BO Name: SHM Invoice

Use this user property to define the business object name to make technical decisions in C++ code.

Value	SHM Invoice

Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Defines the business object name to make technical decisions in C++ code. This user property is active only if the business component is associated with the defined business object.

Line Items BO Name: TNT SHM Function

Use this user property to define a business object name to make technical decisions in C++ code.

Value	TNT SHM Function
Parent Object Type	TNT SHM Quote Item business component
Usage	Defines the business object name to make technical decisions in C++ code. This user property is active only if the business component is associated with the defined business object.

Line Items BO Name: TNT SHM Order Entry

Use this user property to define the business object name to make technical decisions in C++ code.

Value	TNT SHM Order Entry
Parent Object Type	TNT SHM Order Item business component
Usage	Defines the business object name to make technical decisions in C++ code. This user property is active only if the business component is associated with the defined business object.

Line Items BO Name: TNT SHM Templates

Use this user property to define a business object name to make technical decisions in C++ code.

Value	TNT SHM Templates
Parent Object Type	TNT SHM Quote Item business component
Usage	Defines the business object name to make technical decisions in C++ code. This user property is active only if the business component is associated with the defined business object.

Menu Item Field Map 1

Use this user property to carry over the value from Menu Item administration to the function line item when a menu is added to the function line items.

Value	"TNT Split Qty Flag", "Split Price Flag"
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Carries over the value from Menu Item administration to the function line item when a menu is added to the function line items. In this case, TNT Split Qty Flag is a field in the parent object and Split Price Flag is a field in the TNT Menu Item business component. When a menu is added to the function line items, the child menu items are added along with the parent menu. The value of the Split Price Flag field of the TNT Menu Item business component is copied into the TNT Split Qty Flag field of the parent business component. **Note:** For examples, refer to the Menu Item Field Map x (where *x* is equal to 1,2,3...) user properties in the same parent object.

Named Method

Use this user property to call a business service method when a user clicks the Add button to add line items through the Search Add applet.

Value	"AddToList", "INVOKESVC", "Internal Product Popup", "TNT Utility Service", "ListAdd"
Parent Object Type	Internal Product Popup business component
Usage	Calls a business service method when a user clicks the Add button to add line items through the Search Add applet.

Named Method 1

Use this user property to set the Per Person Allocation field to an empty string when the UpdateItemsPPA custom method is called.

Value	"UpdateItemsPPA", "SET", "Per Person Allocation", """"
Parent Object Type	TNT Package Item business component
Usage	For a package item, the Per Person Allocation field must be empty if the parent package is of the Package Item Price type. If the parent package type is modified to Package Item Price, the UpdateItemsPPA custom method is called by the UpdatePPA method from the TNT Product - ISS Admin parent business component.

Named Method 4

Use this user property to set an empty value to the Per Person Allocation parent business component in package items.

Value	"UpdatePPA", "INVOKEALL", "TNT Package Item", "UpdateItemsPPA"

Parent Object Type	TNT Product - ISS Admin business component
Usage	For a package item, Per Person Allocation must be empty if the parent Package is of the Package Item Price type. This user property works with the *On Field Update Invoke* user property. If the Package type is modified to Package Item Price, the UpdatePPA custom method is called, and the call delegates to the UpdateItemsPPA method of the TNT Package Item business component.

Named Method 7

Use this user property to refresh the business component when the SetParentSplitFlag method is called.

Value	"SetParentSplitFlag", "INVOKE", "TNT SHM Invoice Order Item", "RefreshBusComp"
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Refreshes the business component when the TNT Split Qty Flag field is updated for a child menu item, so as to set the appropriate value of Split Menu Flag for the parent menu. This user property works with the *On Field Update Invoke* user property.

Named Method 8

Use this user property to call an internal service method to set the split flag value for the parent menu when the TNT Split Qty Flag field is updated for a child menu item.

Value	"SetParentSplitFlag", "INVOKEALL", "TNT SHM Invoice Order Item", "SetSplitValue"
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Calls an internal service method to set the appropriate value to the Split Menu Flag field for the parent menu when the TNT Split Qty Flag field is updated for a child menu item. This user property works with the *On Field Update Invoke* user property.

Named Method 8

Use this user property with the *On Field Update Invoke 10*, *On Field Update Invoke 11*, and *On Field Update Invoke 12* user properties to update the value of the Quantity Requested field in the child business components.

Value	"UQItemQty", "INVOKEALL", "TNT SHM Quote Item", "UpdateFields"
Parent Object Type	TNT SHM Function business component
Usage	Updates the value of the Quantity Requested field in the child business components. This user property works with the *On Field Update Invoke 10*, *On Field Update Invoke 11*, and *On Field Update Invoke 12* user properties.

Named Method 9

Use this user property to set the split flag value for a parent menu when the TNT Split Qty Flag field is updated for a child menu item.

Value	"SetSplitValue", "INVOKESVC", "TNT SHM Invoice Order Item", "TNT Utility Service", "SetSplitPriceFlag"
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Sets the value of the TNT Split Qty Flag field for the parent menu. This user property works with the *Named Method 8* user property.

Named Method 10

Use this user property with the *On Field Update Invoke 13*, *On Field Update Invoke 14*, and *On Field Update Invoke 15* user properties to update the value of the Quantity Requested field in the child business components.

Value	"UOItemQty", "INVOKEALL", "TNT SHM Order Item", "UpdateField"
Parent Object Type	TNT SHM Function business component
Usage	Updates the value of the Quantity Requested field in the child business components. This user property works with the *On Field Update Invoke 13*, *On Field Update Invoke 14*, and *On Field Update Invoke 15* user properties.

Named Method 11

Use this user property to call the service method to validate the package price with the cumulative allocation of the child line items of the package.

Value	"ValidateAlloc", "INVOKESVC", "TNT SHM Quote Item", "TNT Utility Service", "Validate Allocation Price"
Parent Object Type	TNT SHM Quote Item business component
Usage	Calls the service method to validate the package price with the cumulative allocation of the child line items of the package. • If the cumulative sum of the child item allocations is equal to the price of the parent package, then the following message is displayed. Allocations equal the package net price. • If the cumulative sum of the child item allocations is *not* equal to the price of the parent package, then the following message is displayed. Allocations do not equal the package net price.

Named Method 13

Use this user property to call the service method to set the system allocation to the child line items of the appropriate package.

Value	"UseSysAlloc", "INVOKESVC", "TNT SHM Quote Item", "TNT Utility Service", "Set System Allocation"
Parent Object Type	TNT SHM Quote Item business component
Usage	Calls the service method to set the system allocation to the child line items of the appropriate package.

Named Method 14

Use this user property to call a service method to set the system allocation for the child line items of the appropriate package.

Value	"UseSysAlloc", "INVOKESVC", "TNT SHM Invoice Order Item", "TNT Utility Service", "Set System Allocation"
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Calls a service method to set the system allocation for the child line items of the appropriate package. This user property works with the *On Field Update Invoke 1* user property and the Applet menu method item.

Named Method 15

Use this user property to update the Quantity if Guaranteed/Projected/Expected Num changes in the Parent BC TNT SHM Function.

Value	"UpdateFields", "SET", "Quantity Requested", [QuantityCalc]
Parent Object Type	TNT SHM Quote Item business component
Usage	Updates the Quantity of TNT SHM Quote Item if Guaranteed/Projected/Expected Num changes in the parent business component TNT SHM Function.

Named Method 15

Use this user property to call the service method to validate the package price with the cumulative allocation of the child line items of the package.

Value	"ValidateAlloc", "INVOKESVC", "TNT SHM Invoice Order Item", "TNT Utility Service", "Validate Allocation Price"

Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Calls the service method to validate the package price with the cumulative allocation of the child line items of the package. • If the cumulative sum of the child item allocations is equal to the price of the parent package, then the following message is displayed. Allocations equal the package net price. • If the cumulative sum of the child item allocations is *not* equal to the price of the parent package, then the following message is displayed. Allocations do not equal the package net price.

Named Method 16

Use this user property to refresh the business component when the SetParentSplitFlag method is called.

Value	"SetParentSplitFlag", "INVOKE", "TNT SHM Quote Item", "RefreshBusComp"
Parent Object Type	TNT SHM Quote Item business component
Usage	Calls an internal service method to set the appropriate value for the Split Menu Flag of the parent menu, when the TNT Split Qty Flag field of an associated child menu item is updated. This user property works with the *On Field Update Invoke* user property.

Named Method 17

Use this user property to update the Quantity if Guaranteed/Projected/Expected Num changes in the Parent BC TNT SHM Function.

Value	"UpdateField", "SET", "Quantity Requested", [QuantityCalc]
Parent Object Type	TNT SHM Order Item business component
Usage	Updates the Quantity of TNT SHM Order Item if Guaranteed/Projected/Expected Num changes in the parent business component TNT SHM Function.

Named Method 17

Use this user property to call an internal service method to set the Split flag value for parent menu when TNT Split Qty Flag field of an associated child Menu Item is updated.

Value	"SetParentSplitFlag", "INVOKEALL", "TNT SHM Quote Item", "SetSplitValue"
Parent Object Type	TNT SHM Quote Item business component

Usage	Calls an internal service method to set the appropriate value for the Split Menu Flag of the parent menu, when the TNT Split Qty Flag field of an associated child menu item is updated. This user property works with the *On Field Update Invoke* user property.

Named Method 18

Use this user property to call the service method to validate the package price with the cumulative allocation of the child line items of the package.

Value	"ValidateAlloc", "INVOKESVC", "TNT SHM Order Item", "TNT Utility Service", "Validate Allocation Price"
Parent Object Type	TNT SHM Order Item business component
Usage	Calls the service method to validate the package price with the cumulative allocation of the child line items of the package. • If the cumulative sum of the child item allocations is equal to the price of the parent package, then the following message is displayed. Allocations equal the package net price. • If the cumulative sum of the child item allocations is *not* equal to the price of the parent package, then the following message is displayed. Allocations do not equal the package net price.

Named Method 19

Use this user property to call the service method to set the system allocation to the child line items of the appropriate package.

Value	"UseSysAlloc", "INVOKESVC", "TNT SHM Order Item", "TNT Utility Service", "Set System Allocation"
Parent Object Type	TNT SHM Order Item business component
Usage	Calls the service method to set the system allocation to the child line items of the appropriate package.

Named Method 21

Use this user property to refresh the business component when the SetParentSplitFlag method is called.

Value	"SetParentSplitFlag", "INVOKE", "TNT SHM Order Item", "RefreshBusComp"
Parent Object Type	TNT SHM Order Item business component
Usage	Calls an internal service method to set the appropriate value for the Split Menu Flag of the parent menu, when the TNT Split Qty Flag field of an associated child menu item is updated. This user property works with the *On Field Update Invoke* user property.

Named Method 22

Use this user property to call an internal service method to set the Split flag value for the parent menu when TNT Split Qty Flag field of an associated child Menu Item is updated.

Value	"SetParentSplitFlag", "INVOKEALL", "TNT SHM Order Item", "SetSplitValue"
Parent Object Type	TNT SHM Order Item business component
Usage	Calls an internal service method to set the appropriate value for the Split Menu Flag of the parent menu, when the TNT Split Qty Flag field of an associated child menu item is updated. This user property works with the *On Field Update Invoke* user property.

On Field Update Invoke

Use this user property to call the named methods to mark or unmark the split price for a parent menu when the split flag value of the child menu items changes.

Value	"TNT Split Qty Flag", "TNT SHM Invoice Order Item", "SetParentSplitFlag", "IIf([Type Calc]=""Menu Item"", ""Y"", ""N"")"
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Sets the value of the TNT Split Qty Flag field for the parent menu in function line items when the split flag value of the child menu items changes; that is, when the value of the TNT Split Qty Flag field changes. This user property works with the *Named Method 8* user property.

On Field Update Invoke

Use this user property to call the named methods to select or clear the Split Price field for a parent menu when the value of the TNT Split Qty Flag of an associated child menu item changes.

Value	"TNT Split Qty Flag", "TNT SHM Quote Item", "SetParentSplitFlag", "IIf([Type Calc]=""Menu Item"", ""Y"", ""N"")"
Parent Object Type	TNT SHM Quote Item business component
Usage	Sets the TNT Split Qty Flag for the parent menu in a function line item when the TNT Split Qty Flag value of an associated child menu item changes. This user property works with the *Named Method 8* user property.

On Field Update Invoke

Use this user property to call the named methods to select or clear the Split Price field for a parent menu when the value of the TNT Split Qty Flag of an associated child menu item changes.

Value	"TNT Split Qty Flag", "TNT SHM Order Item", "SetParentSplitFlag", "IIf([Type Calc]=""Menu Item"", ""Y"", ""N"")"
Parent Object Type	TNT SHM Order Item business component
Usage	Sets the TNT Split Qty Flag for the parent menu in a function line item when the TNT Split Qty Flag value of an associated child menu item changes. This user property works with the *Named Method 8* user property.

On Field Update Invoke

Use this user property to clear the System Allocation Flag of the parent package when a split menu or a package of the Package Item Price type is added to the package items.

Value	"Type", "TNT Product - ISS Admin", "UpdateSysFlag", "IIf([Type Calc] = ""Package Item Price"" OR ([Type Calc] = ""Menu Per Person"" AND [Split Menu Item Flag] =""Y""), ""Y"", ""N"")"
Parent Object Type	TNT Package Item business component
Usage	For a package, the System Allocation Flag must be set to False if the package items include either a split menu or a package of the Package Item Price type. When a split menu or a package of the Package Item Price type is associated with a parent package, the UpdateSysFlag custom method of the TNT Product - ISS Admin parent business component is called to clear the System Allocation Flag, if it is selected.

On Field Update Invoke 1

Use this user property to delegate the call to the TNT Package Items child business component to set the value of Per Person Allocation to empty, if the package type is Package Item Price.

Value	"Type", "TNT Product - ISS Admin", "UpdatePPA", "IIf([TNT Type LIC] = ""Package Item Price"", ""Y"", ""N"")"
Parent Object Type	TNT Product - ISS Admin business component
Usage	Delegates the call to the TNT Package Items child business component to set the value of Per Person Allocation to empty, if the package type is Package Item Price.

On Field Update Invoke 1

Use this user property to call a service method to set the system allocation for the child line items of the appropriate package.

Value	"TNT Use System Alloc Flag", "TNT SHM Invoice Order Item", "UseSysAlloc", "Iif([TNT Use System Alloc Flag], ""Y"", ""N"")"
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Calls the System Allocation service method, if the value of the TNT Use System Alloc Flag field changes.

On Field Update Invoke 1

Use this user property to call the service method to set the system allocation to the child line items of the appropriate package, if the TNT Use System Allocation field of the parent or root package is set to True.

Value	"TNT Use System Alloc Flag", "TNT SHM Order Item", "UseSysAlloc", "Iif([TNT Use System Alloc Flag], ""Y"", ""N"")"
Parent Object Type	TNT SHM Order Item business component
Usage	Calls the service method to set the system allocation to the child line items of the appropriate package, if the TNT Use System Allocation field of the parent or root package is set to True.

On Field Update Invoke 1

Use this user property to call the service method to set the system allocation to the child line items of the appropriate package, if the TNT Use System Allocation field of the parent or root package is set to True.

Value	"TNT Use System Alloc Flag", "TNT SHM Invoice Order Item", "UseSysAlloc", "Iif([TNT Use System Alloc Flag], ""Y"", ""N"")"
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Calls the service method to set the system allocation to the child line items of the appropriate package, if the TNT Use System Allocation field of the parent or root package is set to True.

On Field Update Invoke 10

Use this user property to update the value of the Quantity Requested field in the child business component, if the value of the Guaranteed Num field changes.

Value	"Guaranteed Num", "TNT SHM Function", "UQItemQty", "IIf([TNT Is Quote Item BC] = ""Y"", ""Y"", ""N"")"
Parent Object Type	TNT SHM Function business component
Usage	Updates the value of the Quantity Requested field in the child business component, if the value of the Guaranteed Num field changes.

On Field Update Invoke 11

Use this user property to update the value of the Quantity Requested field in the child business component, if the value of the Projected Num field changes.

Value	"Projected Num", "TNT SHM Function", "UQItemQty", "IIf(([Guaranteed Num] IS NULL AND [TNT Is Quote Item BC] = ""Y""), ""Y"", ""N"")"
Parent Object Type	TNT SHM Function business component
Usage	Updates the value of the Quantity Requested field in the child business component, if the value of the Projected Num field changes.

On Field Update Invoke 12

Use this user property to update the value of the Quantity field in the child business component, if the value of the Expected Num field changes.

Value	"Expected Num", "TNT SHM Function", "UQItemQty", "IIf(([Guaranteed Num] IS NULL AND [Projected Num] IS NULL AND [TNT Is Quote Item BC] = ""Y""), ""Y"", ""N"")"
Parent Object Type	TNT SHM Function business component
Usage	Updates the value of the Quantity field in the child business component, if the value of the Expected Num field changes.

On Field Update Invoke 13

Use this user property to call the service method to set the system allocation to the child line items of the appropriate package, if the TNT Use System Allocation field of the parent or root package is set to True.

Value	"TNT Use System Allocation", "TNT SHM Quote Item", "UseSysAlloc", "IIf([TNT Use System Allocation], ""Y"", ""N"")"
Parent Object Type	TNT SHM Quote Item business component

Usage	Calls the service method to set the system allocation to the child line items of the appropriate package, if the TNT Use System Allocation field of the parent or root package is set to True.

On Field Update Invoke 13

Use this user property to update the value of the Quantity field in the child business component, if the value of the Guaranteed Num field changes.

Value	"Guaranteed Num", "TNT SHM Function", "UOItemQty", "IIf([TNT Is Order Item BC] = ""Y"", ""Y"", ""N"")"
Parent Object Type	TNT SHM Function business component
Usage	Updates the value of the Quantity field in the child business component, if the value of the Guaranteed Num field changes.

On Field Update Invoke 14

Use this user property to update the value of the Quantity Requested field in the child business component, if the value of the Projected Num field changes.

Value	"Projected Num", "TNT SHM Function", "UOItemQty", "IIf(([Guaranteed Num] IS NULL AND [TNT Is Order Item BC] = ""Y""), ""Y"", ""N"")"
Parent Object Type	TNT SHM Function business component
Usage	Updates the value of the Quantity Requested field in the child business component, if the value of the Projected Num field changes.

On Field Update Invoke 15

Use this user property to update the value of the Quantity field in the child business component, if the value of the Expected Num field changes.

Value	"Expected Num", "TNT SHM Function", "UOItemQty", "IIf(([Guaranteed Num] IS NULL AND [Projected Num] IS NULL AND [TNT Is Order Item BC] = ""Y""), ""Y"", ""N"")"
Parent Object Type	TNT SHM Function business component
Usage	Updates the value of the Quantity field in the child business component, if the value of the Expected Num field changes.

On Field Update Set 10

Use this user property to reinitialize the Grouping Code field value, if the product type is modified.

Value	"Type", "Grouping Code", "", "[TNT EMMenuPkg View Flag] =Y"
Parent Object Type	TNT Product - ISS Admin business component
Usage	The Grouping Code can be different for each product. This user property reinitializes the Grouping Code, if any, when a product type is modified.

On Field Update Set 11

Use this user property to set the default value of the Unit Of Measure field. The product type determines the default value.

Value	"Type", "Unit of Measure", "IIF ([Calculated Type] = ""Package Each"" or [Calculated Type] = ""Package Item Price"", LookupValue(""UNIT_OF_MEASURE"",""Each""), IIF([Calculated Type] = ""Package Per Person"", LookupValue(""UNIT_OF_MEASURE"",""Person""), [Unit of Measure]))"
Parent Object Type	TNT Product - ISS Admin business component
Usage	Sets the default value of the Unit Of Measure field.

On Field Update Set 47

Use this user property to check that at any time either the Discount Amount field or the Discount Percentage field has a value, but not both fields.

Value	"Discount Amount", "Discount Percent", "IIf ([Discount Amount] IS NOT NULL, """", [Discount Percent])"
Parent Object Type	TNT SHM Quote Item business component
Usage	Checks that at any time either the Discount Amount field or the Discount Percentage field has a value, but not both fields.

On Field Update Set 48

Use this user property to check that at any time either the Discount Amount field or the Discount Percentage field has a value, but not both fields.

Value	"Discount Percent", "Discount Amount", "IIf ([Discount Percent] IS NOT NULL, """", [Discount Amount])"

Parent Object Type	TNT SHM Quote Item business component
Usage	Checks that at any time either the Discount Amount field or the Discount Percentage field has a value, but not both fields.

Package Item Field Map 3

Use this user property to carry over the value from Package Item administration to the function line item when a package is added to the function line items.

Value	"Quantity Requested", "Quantity"
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Carries over the value from Package Item administration to the function line item when a package is added to the function line items. In this case, Quantity Requested is a field in the parent object, and Quantity is a field in the TNT Package Item business component. When a package is added to the function line items, the child package items are added along with the parent package. The value of the Split Price Flag field of the TNT Package Item business component is copied into the TNT Split Qty Flag field of the parent business component. **Note:** For examples, refer to the Package Item Field Map x (where *x* is equal to 1,2,3…) user properties in the same parent object.

Parent Item Product Type

Use this user property to get the Parent Item Product type. This user property is used in C++ code.

Value	Parent Order Item Product Type
Parent Object Type	TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Gets the Parent Item Product type. Used in C++ code.

Parent Item Product Type

Use this user property to get the Parent Item Product type. This user property is used in C++ code.

Value	Parent Product Type
Parent Object Type	TNT SHM Quote Item business component
Usage	Gets the Parent Item Product type. Used in C++ code.

Parent Pick Field

The value of this user property is a business component field. Use this user property to get the picklist for the defined value and add the item to the function line items, using the Quick Add applet. This user property is used in C++ code.

Value	Product
Parent Object Type	Internal Product Popup, Quick Add business components
Usage	The Quick Add applet is the child of the Function Line Items applet. The value of this user property is the parent business components field. This user property is used in C++ code to get the picklist for the defined value and add the item to the function line items through the picklist.

Parent Product Type

Use this user property to get the Parent Item Product type. This user property is used in C++ code.

Value	Parent Product Type
Parent Object Type	TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Gets the Parent Item Product type. Used in C++ code.

Parent Product Type

Use this user property to get the Parent Item Product type. This user property is used in C++ code.

Value	Parent Quote Item Product Type
Parent Object Type	TNT SHM Quote Item business components
Usage	Gets the Parent Item Product type. Used in C++ code.

Pick List SearchSpec:MenuEventItem

Use this user property to set the search specification for the static picklist in the Type field, if the TNT Product - ISS Admin business component is driven by the TNT Property Product Admin List Applet applet.

Value	[Order By] = 201 OR [Order By] = 202
Parent Object Type	Type Field in TNT Product - ISS Admin business component

Usage	The TNT Property Product Admin List Applet applet has the Default Aspect user property and a value of MenuEventItem. If the TNT Product - ISS Admin business component is driven by the TNT Property Product Admin List Applet applet, the search specification for the static picklist in the Type field is formed by the MenuEventItem value.

Pick List SearchSpec:Package

Use this user property to set the search specification for the static picklist of the Type field, if the TNT Product - ISS Admin business component is driven by the TNT Package Administration List Applet applet.

Value	[Order By] = 204 OR [Order By] = 205 OR [Order By] = 206
Parent Object Type	Type Field in TNT Product - ISS Admin business component
Usage	The TNT Package Administration List Applet applet has the Default Aspect user property and a value of Package. If the TNT Product - ISS Admin business component is driven by the TNT Package Administration List Applet applet, the search specification of the static picklist of the Type field is formed by the Package value.

Prefix For Custom Product

Use this user property to define the prefix for the custom-created menus and packages in function line items.

Value	Product Prefix
Parent Object Type	TNT Custom Menu/Package VBC business component
Usage	A menu or package does not have to be predefined in the product list. A menu or package can also be created at run time. The products listed in the table in this topic are provided with Siebel Hospitality as seed data. If a user renames items in the seed data, for example, *WRITE-IN Menus Per Person* instead of *Write-in Menu Per Person,* then the value of the Product Prefix calculated field must be modified accordingly. **Note:** Optionally, you can define a Display Name for each product with any value. The Product Name and Product Type *must* be the same for all the seed products as defined in the following table.

Product Name	Product Type
Write-in Menu Per Person	Menu Per Person
Write-in Menu Item	Menu Item
Write-in Package Per Person	Package Per Person

Product Name	Product Type
Write-in Package Each	Package Each
Write-in Package Item Price	Package Item Price
Write-in Event Order Item	Event Order Item

Product BC Name: TNT Function Line Item Quick Entry View

Use this user property to pass the Product business component name to the C++ code.

Value	Internal Product Popup
Parent Object Type	Internal Product Popup business component
Usage	Retrieves the business component instance in C++ code while adding items to the function line items through the Search Add applet. The second part of the user property name designates the view context. If the active view is the TNT Function Line Item Quick Entry view, then the Internal Product Popup business component instance evaluates defined search criteria and gets the items.

Product BC Name: TNT SHM Order Function Line Items View

Use this user property to retrieve the business component instance in C++ code to evaluate search criteria and get the items while adding items to the function line items through the Search or Quick Add applet.

Value	Internal Product Popup
Parent Object Type	Internal Product Popup business component
Usage	Retrieves the business component instance in C++ code while adding items to the function line items through the Search Add applet. The second part of the user property name designates the view context. If the active view is the TNT SHM Order Function Line Items view, then the Internal Product Popup business component instance evaluates defined search criteria and gets the items.

Product BC Name: TNT SHM Quote Function Line Items View

Use this user property to retrieve the business component instance in C++ code to evaluate search criteria and get the items while adding items to the function line items through the Search or Quick Add applet.

Value	Internal Product Popup
Parent Object Type	Internal Product Popup business component

Usage	Retrieves the business component instance in C++ code while adding items to the function line items through the Search Add applet. The second part of the user property name designates the view context. If the active view is the TNT SHM Quote Function Line Items view, then the Internal Product Popup business component instance evaluates defined search criteria and gets the items.

Recursive Link

Use this user property to permanently delete the child items of a menu or package that is deleted from the function line items.

Value	TNT SHM Invoice Order Item, TNT SHM Invoice Order Item - Deep
Parent Object Type	TNT SHM Invoice Order Item business component
Usage	Permanently deletes the child items of a menu or package that is deleted from the function line items.

Revenue Adjusted Price Field

Use this user property to pass the field name for revenue calculations.

Value	TNT Extended Revenue Estimate Line Total Adjusted - Display
Parent Object Type	TNT SHM Quote Item business component
Usage	Passes the field name for revenue calculations.

Template Copy Fields

Use this user property to specify the fields to be copied when a template is created using the Apply Template method.

Value	Product Id, Quantity Requested, Service Start, Description, Note, Outline Number
Parent Object Type	TNT SHM Quote Item business component
Usage	Specifies the fields to be copied when a template is created using the Apply Template method.

TNT Allocation Validation Diff

Use this user property to define the value of the difference that forms the basis for the validation between the unit net price of a parent package and the accumulated per person allocations of the child package items.

Value	0.01

Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Specifies the value of the difference that forms the basis for the validation between the unit net price of a parent package and the accumulated per person allocations of the child package items.

TNT Extended Net Price Flag

Use this user property to pass the field name to the C++ code.

Value	TNT MP Extended Net Price Flag
Parent Object Type	TNT SHM Invoice Order Item, TNT SHM Order Item, TNT SHM Order Item Copy business components
Usage	Passes the field name to the C++ code.

TNT Item Price Field

Use this user property to get the price value of the line item, which is referenced during the distribution of a per person allocation in C++ code.

Value	Item Price - Display
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	Gets the price value of the line item, which will be referenced during the distribution of a per person allocation in C++ code.

TNT Manual Allocation Field

Use this user property to set the allocation for the defined field in the case of a per person allocation.

Value	TNT Per Person Allocation
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item business components
Usage	The value of this user property is a field, and the per person or system allocation value is set to this field. This user property is used in C++ code to set the appropriate allocation value for the child items of a package.

TNT MPType Flag

Use this user property to pass the field name to the C++ code.

Value	IsMPType
Parent Object Type	TNT SHM Invoice Order Item, TNT SHM Order Item, TNT SHM Order Item Copy business components
Usage	Passes the field name to the C++ code.

TNT No Display Flag

Use this user property to pass the field name to the C++ code.

Value	TNT Guest No Price Flag
Parent Object Type	TNT SHM Invoice Order Item, TNT SHM Order Item, TNT SHM Order Item Copy business components
Usage	Passes the field name to the C++ code.

TNT SHM Line Item Total Field

Use this user property to pass the Line item Total field value to the C++ code for revenue estimate calculations.

Value	TNT Extended Revenue Estimate Line Total - Display
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item, TNT SHM Order Item Copy business components
Usage	Passes the Line item Total field value to the C++ code for revenue estimate calculations.

TNT SHM Line Item Total Field

Use this user property to pass the field name to the C++ code.

Value	TNT Extended Revenue Estimate Line Total - Display
Parent Object Type	TNT SHM Quote Item, TNT SHM Invoice Order Item, TNT SHM Order Item, TNT SHM Order Item Copy business components
Usage	Passes the field name to the C++ code.

User Properties for Histories and Futures

This topic describes the user properties supported for the Histories and Futures functionality of Siebel Hospitality. This topic covers the following subjects:

- *Applet User Properties for Histories and Futures Functionality*
- *Business Component User Properties for Historiesand Futures*

Applet User Properties for Histories and Futures Functionality

This topic describes the following applet user properties:

- *Apply Custom Visibility*
- *Default Aspect*
- *Default Aspect*
- *Default Aspect*
- *Get Service Method*
- *Get Service Name*

Apply Custom Visibility

Use this user property to apply customized visibility rules.

Value	Y
Parent Object Type	TNT History Opportunity List Applet applet
Usage	If this user property is set, then the visibility rules of the framework do not apply, but the customized visibility rules do apply.

Default Aspect

Use this user property to define the Default Aspect property for an applet.

Value	History
Parent Object Type	TNT History Opportunity List Applet applet
Usage	When the aspect is defined, the business component user properties function that is based on the aspect is defined. The Default Aspect is defined as History.

Default Aspect

Use this user property to define the Default Aspect property for an applet.

Value	History
Parent Object Type	TNT Opportunity History Assoc List Applet applet
Usage	When the aspect is defined, the business component user properties function that is based on the aspect is defined. The Default Aspect is defined as History.

Default Aspect

Use this user property to define the Default Aspect property for an applet.

Value	History
Parent Object Type	TNT History Quote List Applet applet
Usage	When the aspect is defined, the business component user properties function that is based on the aspect is defined. The Default Aspect is defined as History.

Get Service Method

Use this user property to specify the service method to be called.

Value	BuildVisibilitySearchSpec
Parent Object Type	TNT History Opportunity List Applet applet
Usage	If this user property is set, then the specified service method will be called to apply visibility in Histories and Futures.

Get Service Name

Use this user property to specify the service to be called.

Value	TNT Utility Service
Parent Object Type	TNT History Opportunity List Applet applet
Usage	If this user property is set, then the specified service will be called to apply visibility in Histories and Futures.

Business Component User Properties for Histories and Futures

This topic describes the following business component user properties:

- *Activation BC 1*
- *Activation BC 2*
- *Activation BC 3*
- *Activation Fields*
- *Activation Fields*
- *Activation Fields*
- *Activation Fields*
- *All Historical Opportunities*
- *All Properties*
- *Apply Visibility Field*
- *Aspect BC ReadOnly: History*
- *Aspect BC ReadOnly: History*
- *Aspect Child BC ReadOnly: History*
- *Aspect Child BC ReadOnly: History*
- *Cluster BC*
- *Cluster BO*
- *Clusters*
- *Clusters Historical Opportunities*
- *Deep Copy 1*
- *Deep Copy 2*
- *Deep Delete 1*
- *Deep Delete 2*
- *Employee BC*
- *Employee BO*
- *Event Template Id*
- *Field Read Only Field: Locked Flag*
- *My Historical Opportunities*
- *My Properties*
- *On Field Update Invoke*
- *Parent Pick Field*
- *Parent Pick Field*
- *Property BC*
- *Skip Setup Style Initialization*
- *Template Copy Fields*
- *Template Copy Fields*

Activation BC 1

Use this user property to activate the fields of the business component specified in the user property value.

Value	TNT History Quote
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then the fields of this business component are activated when the current view is not active.

Activation BC 2

Use this user property to activate the fields of the business component specified in the user property value.

Value	TNT History Functions
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then the fields of this business component are activated when the current view is not active.

Activation BC 3

Use this user property to activate the fields of the business component specified in the user property value.

Value	TNT History Room Blocks
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then the fields of this business component are activated when the current view is not active.

Activation Fields

Use this user property to specify the fields to activate.

Values	Name, Original Opportunity Name, Event Template Name, Account, Intermediary Account, Arrival Date, Departure Date, Opportunity Segment, Type, Locked Flag
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then the specified fields of the business component are activated when the current view is not active.

Activation Fields

Use this user property to specify the fields to be activated.

Values	Property Name, Property Type, Quote Number, Quote Name, Status, Arrival Date, Departure Date, Currency Code, Comments
Parent Object Type	TNT History Quote business component
Usage	If this user property is available, then the specified fields of the business component will be activated when the current view is not active.

Activation Fields

Use this user property to specify the fields to be activated.

Values	Start Date, Start Day, Function Name, # Actual, # Contracted, # Expected, # Guaranteed, Food Revenue, Beverage Revenue, Room Rental Revenue
Parent Object Type	TNT History Functions business component
Usage	If this user property is available, then the specified fields of the business component will be activated when the current view is not active.

Activation Fields

Use this user property to specify the fields to be activated.

Values	Start Date, Start Day, Contracted, Blocked, 90 Day Pickup, 60 Day Pickup, 30 Day Pickup, Actual, Picked Up, Projected, Complimentary
Parent Object Type	History Room Blocks business component
Usage	If this user property is available, then the specified fields of the business component will be activated when the current view is not active.

All Historical Opportunities

Use this user property to pass the name of the Historical Opportunity view that has All visibility.

Value	TNT All Historical Opportunities View
Parent Object Type	TNT History Opportunity business component

Usage	If this user property is available, then apply All visibility.

All Properties

Use this user property to pass the name of the Properties view that has All visibility.

Value	TNT SHM All Property View
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available and the view is accessible, then apply All visibility.

Apply Visibility Field

Use this user property to specify the field on which visibility is applied.

Value	Property Id
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then this field determines the visibility application.

Aspect BC ReadOnly: History

Use this user property to set the business component to read-only mode, if the value of the field specified in the user property is Y.

Value	Calc Locked Flag
Parent Object Type	TNT History Opportunity business component
Usage	When Aspect is defined and the current aspect is Aspect, then the current record becomes read-only when the value of the specified field is Y.

Aspect BC ReadOnly: History

Use this user property to set the business component to read-only mode, if the value of the field specified in the user property is Y.

Value	Calc Locked Flag

Parent Object Type	TNT History Quote business component
Usage	When Aspect is defined, and the current aspect is Aspect, then the current record becomes read-only when the value of Field Name is Y.

Aspect Child BC ReadOnly: History

Use this user property to set the business component to read-only mode, if the value of the field specified in the user property is Y.

Value	Calc Locked Flag
Parent Object Type	TNT History Opportunity business component
Usage	When Aspect is defined and the current aspect is Aspect, then the child business components of the current record become read-only when the value of the specified field is Y.

Aspect Child BC ReadOnly: History

Use this user property to set the business component to read-only mode, if the value of the field specified in the user property is Y.

Value	Calc Locked Flag
Parent Object Type	TNT History Quote business component
Usage	When Aspect is defined, and the current aspect is Aspect, then the child business components of the current record become read-only when the value of Field Name is Y.

Cluster BC

Use this user property to specify the business component name used in the Clusters view.

Value	TNT SHM Cluster
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then while applying visibility, the cluster-related data configured for a specific logged-in user is retrieved from this business component.

Cluster BO

Use this user property to specify the business object name used in the Clusters view.

Value	TNT SHM Cluster
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then while applying visibility, the cluster-related data configured for a specific logged-in user is retrieved from the business component available in this business object.

Clusters

Use this user property to pass the name of the Properties view that has Cluster visibility.

Value	TNT SHM All Property by Cluster View
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available and the view is accessible, then apply Cluster visibility.

Clusters Historical Opportunities

Use this user property to pass the name of the Historical Opportunity view that has Cluster visibility.

Value	TNT My Cluster Historical Opportunities View
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then apply Cluster visibility.

Deep Copy 1

Use this user property to copy the specified child business component when a user selects the Copy option.

Value	TNT History Functions
Parent Object Type	TNT History Quote business component
Usage	When this property is set when a user chooses Copy Record in the parent business component, the specified child business component is also copied.

Deep Copy 2

Use this user property to copy the specified child business component when a user selects the Copy option.

Value	TNT History Room Blocks
Parent Object Type	TNT History Quote business component
Usage	When this property is set when a user chooses Copy Record in the parent business component, the specified child business component is also copied.

Deep Delete 1

Use this user property to delete the specified child business component when a user selects the Delete option.

Value	TNT History Functions
Parent Object Type	TNT History Quote business component
Usage	When this property is set when a user chooses Delete Record in the parent business component, the specified child business component is also deleted.

Deep Delete 2

Use this user property to delete the specified child business component when a user selects the Delete option.

Value	TNT History Room Blocks
Parent Object Type	TNT History Quote business component
Usage	When this property is set when a user chooses Delete Record in the parent business component, the specified child business component is also deleted.

Employee BC

Use this user property to specify the business component name used in the Administration - User screen, Employees and Users views.

Value	Employee
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then while applying visibility, the employee-related data and user-related data of the logged-in user are retrieved from this business component.

Employee BO

Use this user property to specify the business object name used in the Administration - User screen, Employees and Users views.

Value	Employee
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then while applying visibility, the employee-related data and user-related data of the logged-in user are retrieved from the business component available in this business object.

Event Template Id

Use this user property to set the Row Id of a template when working with templates.

Value	Event Template Id
Parent Object Type	Opportunity business component
Usage	If this user property is available when an event template is applied to an opportunity, set the Template Id of Event Template to the business component field name.

Field Read Only Field: Locked Flag

Use this user property to set only the specified field to read-only mode. The value of the user property determines if the specified field is set to read-only mode.

Value	Calc Locked Flag Read Only
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is set, then the field name after the colon (:) in the user property name is read only. The value of the user property determines if this field is read only.

My Historical Opportunities

Use this user property to pass the name of the Historical Opportunity view that has My visibility.

Value	TNT My Historical Opportunities View
Parent Object Type	TNT History Opportunity business component

Usage	If this user property is available, then apply My visibility.

My Properties

Use this user property to pass the name of the Properties view that has My visibility.

Value	TNT SHM My Property View
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available and the view is accessible, then apply My visibility.

On Field Update Invoke

Use this user property to call the specified business component method when a field is updated.

Values	History Opportunity Id, TNT Opportunity History Assoc, UpdateLinks
Parent Object Type	TNT Opportunity History Assoc business component
Usage	When the History Opportunity Id field is updated, then the Update Links method of the business component is called.

Parent Pick Field

Use this user property to set the Template Id to an opportunity field when applying an event template to an opportunity.

Value	Name
Parent Object Type	TNT SHM Opportunity Property business component
Usage	If this user property is available when an event template is applied to an opportunity, set the property from Event Template to the business component field name.

Parent Pick Field

Use this user property to specify the name of the field that has an associated picklist.

Value	Name
Parent Object Type	TNT Opportunity History Assoc business component

Usage	When creating or applying an event template, copies the name of the field with the associated picklist that includes all the details of the selected record, rather than copying all the fields.

Property BC

Use this user property to specify the business component name used in the Property view.

Value	SHM Site
Parent Object Type	TNT History Opportunity business component
Usage	If this user property is available, then while applying visibility, the property-related data configured for a specific logged-in user is retrieved from this business component.

Skip Setup Style Initialization

Use this user property to skip the *setup style initialization*, which is the initialization that occurs when a control is loaded into your Siebel application, for the Function Space Diary.

Value	Y
Parent Object Type	TNT SHM FSI Room Relationships business component
Usage	Setup style initialization is necessary only the first time the Function Space Diary screen is loaded. Activating this user property avoids subsequent initializations. This user property is used in C++ code to improve performance when the Function Space Diary control is loaded into Siebel Hospitality. The default value is Y, which prevents the Function Space Diary control from being initialized when it is loaded into Siebel Hospitality. If the value is N, then the Function Space Diary control is initialized each time it is loaded into Siebel Hospitality.

Template Copy Fields

Use this user property to copy field values from a template when working with templates.

Value	Property Id
Parent Object Type	TNT SHM Opportunity Property business component
Usage	If this user property is available when an event template is applied to an opportunity, set the Property Id from Event Template to the business component field name.
Example	TNT SHM Brand, TNT SHM City

Template Copy Fields

Use this user property to copy the specified field values from a template.

Value	History Opportunity Id
Parent Object Type	TNT Opportunity History Assoc business component
Usage	If this user property is available, then the History Opportunity Id field is copied from the event template to the record to which the event template is applied.

User Properties for Event Checks

This topic describes the user properties supported for the event checks functionality of Siebel Hospitality. This topic covers the following subjects:

- *Applet User Properties for Event Checks*
- *Business Component User Properties for Event Checks*
- *Business Service User Properties for Event Checks*

Applet User Properties for Event Checks

This topic describes the following applet user properties:

- *Can Invoke Method: ConfirmVoidEventCheck*
- *Can Invoke Method: CopyRecord*
- *Can Invoke Method: DeleteRecord*
- *Can Invoke Method: PostCheck*
- *Can Invoke Method: RecalculateInvoiceItemsAndTaxes*
- *Can Invoke Method: ShowPopup*
- *Can Invoke Method: VoidEventCheck*
- *Disable Buscomp Hierarchy*
- *OverridePopupVisibility*
- *View Aspect: SHM Invoice Detail View*
- *View Aspect: SHM Invoice Detail View (Accounting)*
- *View Aspect: SHM Invoice More Info View (Detail)*
- *View Aspect: TNT SHM All Across Organizations Invoice List View*
- *View Aspect: TNT SHM All Invoices by Cluster View*
- *View Aspect: TNT SHM All Invoices by Quote Property View*

- *View Aspect: TNT SHM Event Check Line Item Attribute View*
- *View Aspect: TNT SHM Event Check Line Items More Info View*
- *View Aspect: TNT SHM Event Check Notes View*

CanInvokeMethod: ConfirmVoidEventCheck

Use this user property to enable the Void Event Check button for only event checks with a specified Status field.

Value	[Status] = LookupValue('PS_SUBCONTRACTOR_STATUS', 'Posted')
Parent Object Type	SHM Invoice Form Applet and SHM Invoice List Applet applets
Usage	Enables the Void Event Check button for only event checks with a Status field of Posted.

CanInvokeMethod: CopyRecord

Use this user property to disable the Copy Record functionality for records in the line items applet.

Value	[TNT Disable New Delete Flag] AND [Id] IS NOT NULL
Parent Object Type	TNT SHM Function Line Items List Applet, TNT SHM Order Line Item List Applet, TNT SHM Event Check Line Item List Applet, and TNT SHM Event Check Order Line Item Form Applet applets
Usage	Disables the Copy Record functionality when no records appear in the line items applet.

CanInvokeMethod: DeleteRecord

Use this user property to disable the Delete Record functionality for records in the line items applet.

Value	[TNT Disable New Delete Flag] AND [Id] IS NOT NULL
Parent Object Type	TNT SHM Function Line Items List Applet, TNT SHM Order Line Item List Applet, TNT SHM Event Check Line Item List Applet, and TNT SHM Event Check Order Line Item Form Applet applets
Usage	Disables the Delete Record functionality when no records appear in the line items applet.

CanInvokeMethod: PostCheck

Use this user property to disable the Post Check button for only event checks with the specified Status fields.

Value	[Status] <> LookupValue('PS_SUBCONTRACTOR_STATUS', 'Voided') AND [Status] <> LookupValue('PS_SUBCONTRACTOR_STATUS', 'Posted')
Parent Object Type	SHM Invoice Form Applet and SHM Invoice List Applet applets

Usage	Disables the Post Check button for only event checks with a Status field of Posted or Voided. Such event checks are read only.

CanInvokeMethod: RecalculateInvoiceItemsAndTaxes

Use this user property to disable the Recalculate button for only event checks with the specified Status fields.

Value	[Status] <> LookupValue('PS_SUBCONTRACTOR_STATUS', 'Voided') AND [Status] <> LookupValue('PS_SUBCONTRACTOR_STATUS', 'Posted')
Parent Object Type	SHM Invoice Form Applet applet
Usage	Disables the Recalculate button for only event checks with a Status field of Posted or Voided. Such event checks are read only.

CanInvokeMethod: ShowPopup

Use this user property to disable the Post Day button for only event checks with the specified Status fields.

Value	[Status] <> LookupValue('PS_SUBCONTRACTOR_STATUS', 'Voided') AND [Status] <> LookupValue('PS_SUBCONTRACTOR_STATUS', 'Posted')
Parent Object Type	SHM Invoice Form Applet and SHM Invoice List Applet applets
Usage	Disables the Post Day button for only event checks with a Status field of Posted or Voided. Such event checks are read only.

CanInvokeMethod: VoidEventCheck

Use this user property to call the VoidEventCheck method for only event checks with a specified Status field.

Value	[Status] = LookupValue('PS_SUBCONTRACTOR_STATUS', 'Posted')
Parent Object Type	SHM Invoice Form Applet and SHM Invoice List Applet applets
Usage	Calls the VoidEventCheck method for only event checks with a Status field of Posted.

Disable Buscomp Hierarchy

Use this user property to disable the function hierarchy in the Functions List Applet of the Event Checks screen.

Value	True

Parent Object Type	TNT SHM Invoice Function List Applet applet
Usage	Disables the function hierarchy in the Functions List Applet of the Event Checks screen.

OverridePopupVisibility

Use this user property to restrict the properties that appear in the dialog box that appears when users click the Open Day button and the Post Day button.

Value	TNT Property Name, 5
Parent Object Type	SHM Check Date VBC Form Applet applet
Usage	Restricts the properties that appear in the dialog box that appears when users click the Open Day button and the Post Day button.

View Aspect: SHM Invoice Detail View

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS
Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the SHM Invoice Detail View becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

View Aspect: SHM Invoice Detail View (Accounting)

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS
Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the SHM Invoice Detail View (Accounting) becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

View Aspect: SHM Invoice More Info View (Detail)

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS
Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the SHM Invoice More Info View (Detail) becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

View Aspect: TNT SHM All Across Organizations Invoice List View

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS
Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the TNT SHM All Across Organizations Invoice List View becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

View Aspect: TNT SHM All Invoices by Cluster View

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS
Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the TNT SHM All Invoices by Cluster View becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

View Aspect: TNT SHM All Invoices by Quote Property View

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS

Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the TNT SHM All Invoices by Quote Property View becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

View Aspect: TNT SHM Event Check Line Item Attribute View

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS
Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the TNT SHM Event Check Line Item Attribute View becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

View Aspect: TNT SHM Event Check Line Items More Info View

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS
Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the TNT SHM Event Check Line Items More Info View becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

View Aspect: TNT SHM Event Check Notes View

Use this user property to set the event checks with the specified Status fields as read-only records.

Value	TNT_EVENT_CHECK_STATUS
Parent Object Type	SHM Invoice Form Applet applet
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records. When the user selects these event checks, the TNT SHM Event Check Notes View becomes a read-only view. When an event check is a read-only record, any associated function or line item records are also read-only records.

Business Component User Properties for Event Checks

This topic describes the following business component user properties:

- *Aspect BC ReadOnly: TNT_EVENT_CHECK_STATUS*
- *Aspect Child BC ReadOnly: TNT_EVENT_CHECK_STATUS*
- *State Model*

Aspect BC ReadOnly: TNT_EVENT_CHECK_STATUS

Use this user property to set the event checks with the specified Status fields as read-only records when those records are associated with the FS Invoice business component.

Value	TNT Invoice Status Read Only View Flag
Parent Object Type	FS Invoice business component
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records when those records are associated with the FS Invoice business component.

Aspect Child BC ReadOnly: TNT_EVENT_CHECK_STATUS

Use this user property to set the event checks with the specified Status fields as read-only records when those records are associated with the FS Invoice child business component.

Value	TNT Invoice Status Read Only View Flag
Parent Object Type	FS Invoice business component
Usage	Sets the event checks with a Status field of Posted or Voided as read-only records when those records are associated with the FS Invoice child business component.

State Model

Use this user property to deactivate the state model.

Value	Y
Parent Object Type	FS Invoice business component
Usage	Deactivates the state model.

Business Service User Properties for Event Checks

This topic describes the following business service user properties:

- *Async Workflow Call for Source Recalculate Invoice*
- *Recalculate Workflow Name*
- *Order Item BC Name*

Async Workflow Call for Source Recalculate Invoice

Use this user property to asynchronously call the workflow that recalculates taxes and service charges when users divide event checks or move items between event checks.

Value	Y
Parent Object Type	SHM Invoice Process business service
Usage	Asynchronously calls the workflow that recalculates taxes and service charges when users divide event checks or move items between event checks.

Recalculate Workflow Name

Use this user property to get the SHM Recalculate Invoice Items workflow instead of using hard code to get this workflow.

Value	SHM Recalculate Invoice Items Workflow
Parent Object Type	SHM Invoice Process business service
Usage	Gets the SHM Recalculate Invoice Items workflow instead of using hard code to get this workflow.

Order Item BC Name

Use this user property to get the TNT SHM Invoice Order Item business component instead of using hard code to get this business component.

Value	TNT SHM Invoice Order Item
Parent Object Type	SHM Invoice Process business service
Usage	Gets the TNT SHM Invoice Order Item business component instead of using hard code to get this business component.

User Properties for Banquet Event Order Report

This topic describes the user properties supported for the banquet event order report functionality of Oracle's Siebel Hospitality. This topic covers the following subjects:

- *Applet User Properties for Banquet Event Order Reports*
- *Business Component User Properties for Banquet Event Order Reports*

Applet User Properties for Banquet Event Order Reports

This topic describes the following applet user properties:

- *IsSearchSpecFldMVG*
- *Named Method 1: DeleteRecord*
- *Named Method 2: DeleteRecord*
- *SearchSpecField*

IsSearchSpecFldMVG

Use this user property to designate if the search specification field in the *SearchSpecField* user property is a MVG (Multi-Value Group) field.

Value	N
Parent Object Type	TNT SHM Report Section MVG Applet applet
Usage	Designates if the search specification field in the *SearchSpecField* user property is a MVG (Multi-Value Group) field.

Named Method 1: DeleteRecord

Use this user property to recalculate the Split Qty Flag for the parent line item when a user deletes a child line item.

Value	'INVOKE', 'DeleteRecord'
Parent Object Type	TNT SHM Function Line Items List Applet, TNT SHM Order Line Item List Applet, TNT SHM Event Check Line Item List Applet, and TNT SHM Event Check Order Line Item Form Applet applets
Usage	Recalculates the Split Qty Flag for the parent line item when a user deletes a child line item. This user property works with the *Named Method 2: DeleteRecord* user property.

Named Method 2: DeleteRecord

Use this user property to recalculate the Split Qty Flag for the parent line item when a user deletes a child line item.

Value	'INVOKE', 'SetParentSplitFlag'
Parent Object Type	TNT SHM Function Line Items List Applet, TNT SHM Order Line Item List Applet, TNT SHM Event Check Line Item List Applet, and TNT SHM Event Check Order Line Item Form Applet applets
Usage	Recalculates the Split Qty Flag for the parent line item when a user deletes a child line item. This user property works with the *Named Method 1: DeleteRecord* user property.

SearchSpecField

Use this user property to prepare the search specification.

Value	PS Property Id
Parent Object Type	TNT SHM Report Section MVG Applet applet
Usage	Prepares the search specification. This user property is used in C++ code, and works with the *IsSearchSpecFldMVG* user property.

Business Component User Properties for Banquet Event Order Reports

This topic describes the following business component user properties:

- *Copy Function Calculate Price: Quote*
- *Disable Hierarchy: SHM Invoice*
- *Disable Hierarchy: TNT SHM Order Entry*
- *Field Read Only Field: Date*
- *Field Read Only Field: Day#*
- *Field Read Only Field: Day#*
- *Field Read Only Field: Start Date*
- *IsSearchSpecFldMVG*
- *Menu Item Field Map 7*
- *Menu Item Field Map 7*
- *Named Method 1*
- *Named Method 2*
- *Named Method 3*
- *Named Method 3*
- *Named Method 11*
- *On Field Update Invoke 1*

- *On Field Update Invoke 16*
- *On Field Update Invoke 17*
- *On Field Update Invoke 18*
- *On Field Update Invoke 19*
- *On Field Update Set*
- *On Field Update Set 1*
- *Package Item Field Map 6*
- *Package Item Field Map 6*
- *SearchSpecField*
- *Sequence Field*
- *Template Copy Fields*
- *Template Copy Fields*

Copy Function Calculate Price: Quote

Use this user property to designate that the price must be calculated for line items when users copy a function.

Value	Y
Parent Object Type	TNT SHM Function business component
Usage	This user property is used in C++ code and created with the business object. If the active business object is Quote, then the price must be calculated for line items when users copy a function.

Disable Hierarchy: SHM Invoice

This user property is used in C++ code to disable or enable the function hierarchy in the active business object when the Day number (#) field and Date field for the function change.

Value	Y
Parent Object Type	TNT SHM Function business component
Usage	This user property is used in C++ code to disable or enable the function hierarchy in the active business object when the Day number (#) field and Date field for the function change.

Disable Hierarchy: TNT SHM Order Entry

This user property is used in C++ code to disable or enable the function hierarchy in the active business object when the Day number (#) field and Date field for the function change.

Value	Y

Parent Object Type	TNT SHM Function business component
Usage	This user property is used in C++ code to disable or enable the function hierarchy in the active business object when the Day number (#) field and Date field for the function change.

Field Read Only Field: Date

Use this user property to set the Date field for subfunctions to a read-only mode.

Value	Is Sub Function Flag
Parent Object Type	TNT SHM Function business component
Usage	Sets the Date field for subfunctions to a read-only mode.

Field Read Only Field: Day#

Use this user property to set the Day number (#) field for subfunctions to a read-only mode.

Value	Is Sub Function Flag
Parent Object Type	TNT SHM Function business component
Usage	Sets the Day number (#) field for subfunctions to a read-only mode.

Field Read Only Field: Day#

Use this user property to set the Day number (#) field for subfunctions to a read-only mode.

Value	DateReadOnlyFlag
Parent Object Type	TNT SHM Agenda Functions business component
Usage	Sets the Day number (#) field for subfunctions to a read-only mode.

Field Read Only Field: Start Date

Use this user property to set the Start Date field for subfunctions to a read-only mode.

Value	DateReadOnlyFlag
Parent Object Type	TNT SHM Agenda Functions business component

Usage	Sets the Start Date field for subfunctions to a read-only mode.

IsSearchSpecFldMVG

Use this user property to designate if the search specification field in the *SearchSpecField* user property is a MVG (Multi-Value Group) field.

Value	N
Parent Object Type	TNT SHM Property Report Section business component
Usage	Designates if the search specification field in the *SearchSpecField* user property is a MVG (Multi-Value Group) field.

Menu Item Field Map 7

Use this user property to copy the report header value for child items in product and property administration to quote line items.

Value	"TNT Product Report Header Id", "Report Header Id"
Parent Object Type	TNT SHM Quote Item business component
Usage	Copies the report header value for child items in product and property administration to quote line items.

Menu Item Field Map 7

Use this user property to copy the report header value for child items in product and property administration to order line items.

Value	"TNT Report Section Id", "Report Header Id"
Parent Object Type	TNT SHM Order Item business component
Usage	Copies the report header value for child items in product and property administration to order line items.

Named Method 1

Use this user property to update the projected revenue for revenue estimates when the Projected, Expected, and Guaranteed fields for a function change.

Value	"Update Revenue", "INVOKE", "TNT SHM Quote Function Revenue Estimates", "ExpandAll"
Parent Object Type	TNT SHM Quote Function Revenue Estimates business component
Usage	Updates the projected revenue for revenue estimates when the Projected, Expected, and Guaranteed fields for a function change. This user property works with the *Named Method 2* and *Named Method 3* user properties.

Named Method 2

Use this user property to update the projected revenue for revenue estimates when the Projected, Expected, and Guaranteed fields for a function change.

Value	"Update Revenue", "INVOKEALL", "TNT SHM Quote Function Revenue Estimates", "Set Revenue"
Parent Object Type	TNT SHM Quote Function Revenue Estimates business component
Usage	Updates the projected revenue for revenue estimates when the Projected, Expected, and Guaranteed fields for a function change. This user property works with the *Named Method 1* and *Named Method 3* user properties.

Named Method 3

Use this user property to update the projected revenue for revenue estimates when the Projected, Expected, and Guaranteed fields for a function change.

Value	"Set Revenue", "SET", "Projected Revenue - Function", "[Projected Revenue Per Person] * [Parent Attendees Calc]"
Parent Object Type	TNT SHM Quote Function Revenue Estimates business component
Usage	Updates the projected revenue for revenue estimates when the Projected, Expected, and Guaranteed fields for a function change. This user property works with the *Named Method 1* and *Named Method 2* user properties.

Named Method 3

Use this user property to update the Day number (#) field and Date field for the associated subfunctions when the same fields for a function change.

Value	"Update Sub Function", "INVOKESVC", "TNT SHM Agenda Functions", "TNT SHM Day Number", "UpdateSubFunction"
Parent Object Type	TNT SHM Agenda Functions business component

Usage	Updates the Day number (#) field and Date field for the associated subfunctions when the same fields for a function change. This user property works with the *On Field Update Invoke 1* user property.

Named Method 11

Use this user property to update the Day number (#) field and Date field for the associated subfunctions when the same fields for a function change.

Value	"Update Sub Function", "INVOKESVC", "TNT SHM Function", "TNT SHM Day Number", "UpdateSubFunction"
Parent Object Type	TNT SHM Function business component
Usage	Updates the Day number (#) field and Date field for the associated subfunctions when the same fields for a function change. This user property works with the *On Field Update Invoke 19* user property.

On Field Update Invoke 1

Use this user property to update the Day number (#) field and Date field for the associated subfunctions when the same fields for a function change.

Value	"Day #", "TNT SHM Agenda Functions", "Update Sub Function", "[Child Function Id] IS NOT NULL"
Parent Object Type	TNT SHM Agenda Functions business component
Usage	Updates the Day number (#) field and Date field for the associated subfunctions when the same fields for a function change. This user property works with the *Named Method 3* user property.

On Field Update Invoke 16

Use this user property to update the projected revenue for revenue estimates when the Projected field for a function changes.

Value	"Projected Num", "TNT SHM Quote Function Revenue Estimates", "Update Revenue", "[Guaranteed Num] IS NULL"
Parent Object Type	TNT SHM Function business component
Usage	Updates the projected revenue for revenue estimates when the Projected field for a function changes.

On Field Update Invoke 17

Use this user property to update the projected revenue for revenue estimates when the Guaranteed field for a function changes.

Value	"Guaranteed Num", "TNT SHM Quote Function Revenue Estimates", "Update Revenue"
Parent Object Type	TNT SHM Function business component
Usage	Updates the projected revenue for revenue estimates when the Guaranteed field for a function changes.

On Field Update Invoke 18

Use this user property to update the projected revenue for revenue estimates when the Expected field for a function changes.

Value	"Expected Num", "TNT SHM Quote Function Revenue Estimates", "Update Revenue", "[Guaranteed Num] IS NULL AND [Projected Num] IS NULL"
Parent Object Type	TNT SHM Function business component
Usage	Updates the projected revenue for revenue estimates when the Expected field for a function changes.

On Field Update Invoke 19

Use this user property to update the Day number (#) field and Date field for the associated subfunctions when the same fields for a function change.

Value	"Day#", "TNT SHM Function", "Update Sub Function", "[Child Function Id] IS NOT NULL"
Parent Object Type	TNT SHM Function business component
Usage	Updates the Day number (#) field and Date field for the associated subfunctions when the same fields for a function change. This user property works with the *Named Method 11* user property.

On Field Update Set

Use this user property to capture in the Revision Time field the date and time that the track changes flag changes.

Value	"Track Changes Flag", "Revision Time", "Iif ([Track Changes Flag]= 'Y', Timestamp(), '')"
Parent Object Type	Order Entry - Orders business component
Usage	Captures in the Revision Time field the date and time that the track changes flag changes.

On Field Update Set 1

Use this user property to set the default value for the report header label to the report header name.

Value	"Report Section", "Display Name", "[Report Section]"
Parent Object Type	TNT SHM Property Report Section business component
Usage	Sets the default value for the report header label to the report header name.

Package Item Field Map 6

Use this user property to copy the report header value for child items in product and property administration to quote line items.

Value	"TNT Product Report Header Id", "Report Header Id"
Parent Object Type	TNT SHM Quote Item business component
Usage	Copies the report header value for child items in product and property administration to quote line items.

Package Item Field Map 6

Use this user property to copy the report header value for child items in product and property administration to order line items.

Value	"TNT Report Section Id", "Report Header Id"
Parent Object Type	TNT SHM Order Item business component
Usage	Copies the report header value for child items in product and property administration to order line items.

SearchSpecField

Use this user property to prepare the search specification.

Value	Parent Property Id
Parent Object Type	TNT SHM Property Report Section business component

Usage	Prepares the search specification. This user property is used in C++ code, and works with the *IsSearchSpecFldMVG* user property.

Sequence Field

Use this user property to get a sequence number when users create a new record.

Value	Sequence Num
Parent Object Type	TNT Function Report Comments and TNT SHM BEO Section Description business components
Usage	Gets a sequence number when users create a new record.

Template Copy Fields

Use this user property to specify the copied fields when users create a template for a function.

Value	Day#, Function Type, Function Name, Start, Duration, End, Setup Style, Expected Num, Function Space, Post As, Comments, Projected Num, Room Area, Room Area Square Meters, Meal Period, Flow Flag, Spacious Set Flag, Noise Flag, Best Fit Suite Only, TNT SubFunction Location
Parent Object Type	TNT SHM Function business component
Usage	Specifies the copied fields when users create a template for a function.

Template Copy Fields

Use this user property to specify the copied fields when users create a template for an agenda function.

Value	Day #, Function Type, Name, Start Time, Duration, End Time, Setup Style, Expected #, Projected, Room Area, Room Area Square Meters, Meal Period, Flow Flag, Spacious Set Flag, Noise Flag, Bypass Flag, Best Fit Suite Only Flag, Location
Parent Object Type	TNT SHM Agenda Functions business component
Usage	Specifies the copied fields when users create a template for an agenda function.

User Properties for Space Hold

This topic describes the user properties supported for the Space Hold functionality of Siebel Hospitality. This topic describes the following user properties:

- *CanInvoke Method: ReleaseInventory*
- *Enable Sub Function Dependency At Detail Function*
- *Item BC Search Space*
- *Load Business Component Name*
- *Named Method 3*
- *Named Method 11*
- *Named Method 12*
- *Sort Specification Field*
- *Sort Specification Field*
- *TNT SHM Field Names*
- *TNT SHM Field Names*
- *TNT SHM Has Function Space Field*
- *TNT SHM Has Function Space Field*
- *TNT SHM Parent Function Field Names*
- *TNT SHM Parent Function Field Names*
- *TNT SHM Parent Function Write Field Names*
- *TNT SHM Write Field Names*
- *ViewMode Sort:3*
- *ViewMode Sort:3*

CanInvokeMethod: ReleaseInventory

Use this user property to enable or disable the ReleaseInventory method.

Value	[TNT Disable Release Flag] AND [Id] IS NOT NULL
Parent Object Type	TNT SHM Functions List Applet, TNT SHM Order Function List Applet applet
Usage	This user property is used to enable or disable the ReleaseInventory method. If the function record has an inventory status other than Unreserved, then only the ReleaseInventory method can be invoked.

Enable Sub Function Dependency At Detail Function

Use this user property to define a business object name to make technical decisions in C++ code.

Value	N
Parent Object Type	TNT SHM Function Booking VBC business component
Usage	This user property is used in C++ code. If the value is Y, then dependencies for the subfunction will be created and displayed at the detail function booking level. If the value is N, then dependencies for the subfunction will not be created and displayed at the detail function booking level.

Item BC Search Space

Use this user property to get an expression and set it as a named search specification for the TNT SHM Function Booking VBC business component.

Value	Update BC Search Spec Field
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Function Space Diary Total Availability Applet applet
Usage	The TNT SHM Function Booking VBC business component search specification is truncated to enable the display of subfunctions in the Function Space Diary. If a user does not want to display the subfunctions, this user property is used in C++ code to restore the search specification to its original, untruncated form.

Load Business Component Name

Use this user property to define a business object name to make technical decisions in C++ code.

Value	TNT SHM Gantt AX Admin Specialized Controls
Parent Object Type	TNT SHM Function Booking VBC business component
Usage	This user property is used in C++ code to return Function Space Diary administration values. The Function Space Diary administration value will be returned from the respective defined business component.

Named Method 3

Use this user property to call the ReleaseInventory() method of the TNT SHM Function Booking business component when the ReleaseInventory() method is called.

Value	ReleaseInventory, INVOKE, TNT SHM Function Booking, Release
Parent Object Type	TNT SHM Function Booking business component
Usage	This user property is used in conjunction with the Named Method 11 user property of the TNT SHM Function business component. This user property is used to call the Release method to release the inventory.

Named Method 11

Use this user property to call the ReleaseInventory() method of the TNT SHM Function Booking business component when the ReleaseInventory() method is called.

Value	ReleaseInventory, INVOKEALL, TNT SHM Function Booking, ReleaseInventory
Parent Object Type	TNT SHM Function business component
Usage	This user property is used to invoke a named method when the Release applet menu item is selected to release the inventory.

Named Method 12

Use this user property to call the RefreshBusComp() method of the TNT SHM Function business component when the ReleaseInventory() method is called.

Value	ReleaseInventory, INVOKE, TNT SHM Function, RefreshBusComp
Parent Object Type	TNT SHM Function business component
Usage	This user property is used in conjunction with the Named Method 11 user property to refresh the TNT SHM Function business component.

Sort Specification Field

Use this user property to sort the functions in the Create Agenda Sub Function pop-up applet.

Value	Start Time
Parent Object Type	TNT SHM Agenda Functions business component
Usage	This user property is used to sort the functions in the Opportunities screen, Function Agenda view. This user property is used only if the ViewMode Sort:3 user property is not available. To sort the Function Agenda list on a different field, modify the value of this user property with that field name.

Sort Specification Field

Use this user property to sort the subfunctions in Create Agenda Sub Function pop-up applet.

Value	Start
Parent Object Type	TNT SHM Function business component
Usage	This user property is used to sort the functions in the Opportunities screen, Function Agenda view. This user property is used only if the ViewMode Sort:3 user property is not available. To sort the functions on a different field, modify the value of this user property with that field name.

TNT SHM Field Names

This user property is used in conjunction with the TNT SHM Parent Function Field Names user property of the TNT SHM Agenda Functions business component. Use this user property to define the field names to be used to display the existing subfunction details in the Sub Function pop-up applet. Also, if there is any change in the subfunction details, use this user property to map all these field values back to the parent business component.

In C++, the field values are copied from the TNT SHM Create Agenda Sub Function VBC business component to the TNT SHM Agenda Functions business component in the defined field order. Therefore, you must maintain the order of the fields to determine from which field in the TNT SHM Create Agenda Sub Function VBC business component to which field in the TNT SHM Agenda Functions business component each value is copied.

Value	TNT SHM Day#, TNT SHM Function Type, TNT SHM Post As/Signage, TNT SHM Date, TNT SHM End Time, TNT SHM Flow, TNT SHM Location, TNT SHM Projected, TNT SHM Start Time, TNT SHM Expected Attendees

Parent Object Type	TNT SHM Create Agenda Sub Function VBC business component
Usage	This user property is used in C++ code in conjunction with the TNT SHM Agenda Functions business component. For more information about the usage of this user property, see *TNT SHM Parent Function Field Names*.

TNT SHM Field Names

This user property is used in conjunction with the TNT SHM Parent Function Field Names user property of the TNT SHM Functions business component. Use this user property to define the field names to be used to display the existing subfunction details in the Sub Function pop-up applet. Also, if there is any change in the subfunction details, use this user property to map all these field values back to the parent business component.

In C++, the field values are copied from the TNT SHM Create Sub Function VBC business component to the TNT SHM Functions business component in the defined field order. Therefore, you must maintain the order of the fields to determine from which field in the TNT SHM Create Sub Function VBC business component to which field in the TNT SHM Functions business component each value is copied.

Value	TNT SHM Day#, TNT SHM Function Type, TNT SHM Post As/Signage, TNT SHM Date, TNT SHM End Time, TNT SHM Flow, TNT SHM Location, TNT SHM Projected, TNT SHM Start Time, TNT SHM Expected Attendees, TNT SHM Function Space Id, TNT SHM Function Space
Parent Object Type	TNT SHM Create Sub Function VBC business component
Usage	This user property is used in C++ code in conjunction with the TNT SHM Function business component. For more information about the usage of this user property, see *TNT SHM Parent Function Field Names*.

TNT SHM Has Function Space Field

Use this user property to define whether or not the function space option is available for the function agenda.

Value	N
Parent Object Type	TNT SHM Create Agenda Sub Function VBC business component
Usage	This user property is used in C++ code to manage function space functionality. By default, the value is N, indicating that function space is not available in the Opportunities screen, Function Agenda view. Modify the value to Y if function space is available for the function agenda.

TNT SHM Has Function Space Field

Use this user property to define whether or not the function space option is available for the function agenda.

Value	Y
Parent Object Type	TNT SHM Create Sub Function VBC business component
Usage	This user property is used in C++ code to manage function space functionality. By default, the value is Y, indicating that function space is available in the Functions views of the Quotes, Orders, and Event Checks screens. Modify the value to N if function space is not available for the function.

TNT SHM Parent Function Field Names

This user property is used in conjunction with the TNT SHM Field Names user property of the TNT SHM Create Agenda Sub Function VBC business component. Use this user property to define the field names to be copied in the subfunction. Also, when the Sub Function pop-up applet is opened, use this user property to display these field values as subfunction records.

In C++, the field values are copied from the TNT SHM Create Agenda Sub Function VBC business component to the TNT SHM Agenda Functions business component in the defined field order. Therefore, you must maintain the order of the fields to determine from which field in the TNT SHM Create Agenda Sub Function VBC business component to which field in the TNT SHM Agenda Functions business component each value is copied.

Value	Day #, Function Type, Name, Start Date, End Time, Flow Flag, Location, Projected, Start Time, Expected #
Parent Object Type	TNT SHM Agenda Functions business component
Usage	This user property is used in C++ code in conjunction with the TNT SHM Create Agenda Sub Function VBC business component. When a user clicks the Sub Function button, the subfunctions of the selected function are displayed in the Create Agenda Sub Function pop-up applet. Similarly, if the existing subfunction details are modified or if new subfunctions are added, these changes are displayed in Opportunity screen, Function Agenda view. This user property is used to map the VBC fields with the fields of the TNT SHM Agenda Functions parent business component. If you add, delete, or modify fields, then to display these changes, you must modify the value of this user property, and also the value of the TNT SHM Field Names user property in the TNT SHM Create Agenda Sub Function VBC business component.

TNT SHM Parent Function Field Names

This user property is used in conjunction with the TNT SHM Field Names user property of the TNT SHM Create Sub Function VBC business component. Use this user property to define the field names to be copied in the subfunction when the Sub Function pop-up applet is opened.

In C++, the field values are copied from the TNT SHM Create Sub Function VBC business component to the TNT SHM Functions business component in the defined field order. Therefore, you must maintain the order of the fields to determine from which field in the TNT SHM Create Sub Function VBC business component to which field in the TNT SHM Functions business component each value is copied.

Value	Day#, Function Type, Function Name, Date, End, Flow Flag, TNT SubFunction Location, Projected Num, Start, Expected Num, Joined Function Space ID, Joined Function Space Name
Parent Object Type	TNT SHM Function business component
Usage	This user property is used in C++ code in conjunction with the TNT SHM Create Sub Function VBC business component. When a user clicks the Sub Function button, the subfunctions of the selected function are displayed in Create Agenda Sub Function pop-up applet. Similarly, if the existing subfunction details are modified or if new subfunctions are added, these changes are displayed in the Functions views of the Quotes and Orders screens. This user property is used to map the VBC fields with the fields of the TNT SHM Function parent business component. If you add, delete, or modify fields, then to display these changes, you must modify this user property value, and also the value of the TNT SHM Field Names user property of the TNT SHM Create Sub Function VBC business component.

TNT SHM Parent Function Write Field Names

This user property is used in conjunction with the TNT SHM Write Field Names user property. Use this user property to define the names of the fields that receive changes in subfunction details from the TNT SHM Create Sub Function VBC business component. Also use this user property to define the field names to be copied in the subfunction so that when the Sub Function pop-up applet is opened, all these field values are displayed as the existing subfunction records.

In C++, the field values are copied from the TNT SHM Create Sub Function VBC business component to the TNT SHM Function business component in the defined field order. Therefore, you must maintain the order of the fields to determine from which field in the TNT SHM Create Sub Function VBC business component to which field in the TNT SHM Functions business component each value is copied.

Value	Day#, Function Type, Function Name, Date, End, Flow Flag, TNT SubFunction Location, Projected Num, Start, Expected Num, Joined Function Space ID, Joined Function Space Name
Parent Object Type	TNT SHM Function business component
Usage	This user property is used in C++ code in conjunction with the TNT SHM Create Sub Function VBC business component. When a user clicks the Sub Function button, the subfunctions of the selected

	function are displayed in Create Agenda Sub Function pop-up applet. Similarly, if the existing subfunction details are modified or if new subfunctions are added, these changes are displayed in the Functions views of the Quotes and Orders screens. This user property is used to map the VBC fields with the fields of the TNT SHM Function parent business component. If you add, delete, or modify fields, then to display these changes, you must modify this user property value, and also the value of the TNT SHM Field Names user property of the TNT SHM Create Sub Function VBC business component.

TNT SHM Write Field Names

This user property is used in conjunction with the TNT SHM Parent Function Write Field Names user property of the TNT SHM Function business component. Use this user property to define the field names to map back to the parent business component to save changes in the subfunction details.

In C++, the field values are copied from the TNT SHM Create Sub Function VBC business component to the TNT SHM Function business component in the defined field order. Therefore, you must maintain the order of the fields to determine from which field in the TNT SHM Create Sub Function VBC business component to which field in the TNT SHM Functions business component each value is copied.

Value	TNT SHM Day#, TNT SHM Function Type, TNT SHM Post As/Signage, TNT SHM Date, TNT SHM End Time, TNT SHM Flow, TNT SHM Location, TNT SHM Projected, TNT SHM Start Time, TNT SHM Expected Attendees, TNT SHM Function Space Id, TNT SHM Function Space
Parent Object Type	TNT SHM Create Sub Function VBC business component
Usage	This user property is used in C++ code in conjunction with the TNT SHM Function business component. For more information about the usage of this user property, see *TNT SHM Parent Function Write Field Names*.

ViewMode Sort:3

Use this user property to sort the functions in the Create Agenda Sub Function pop-up applet.

Value	Start Time
Parent Object Type	TNT SHM Agenda Functions business component
Usage	This user property is used to sort the functions in the Opportunities screen, Function Agenda view. To sort the Function Agenda list on a different field, modify the value of this user property with that field name.

ViewMode Sort:3

Use this user property to sort the functions in Create Agenda Sub Function pop-up applet.

Value	Start
Parent Object Type	TNT SHM Function business component
Usage	This user property is used to sort the functions in the Opportunities screen Function Agenda view. If you sort the functions on a different field, then modify the value of this user property with that field name.

User Properties for Run of House

This topic describes the user properties supported for the Run of House functionality of Siebel Hospitality. This topic describes the following user properties:

- *AddSellNoteRowOnTop*
- *Pivot 0 BC Sort Spec*
- *ROH Main Search Spec Field Name*
- *ROH Sub Search Spec Field Name*

AddSellNoteRowOnTop

Use this user property to decide the position for displaying sell notes.

Value	Y
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type business components
Usage	This user property is used to decide the position for displaying sell notes. If the value is Y, then the sell notes are displayed at the start of the Total Group Availability applet. If the value is not Y, then the sell notes are displayed at the end of Total Group Availability applet. In the later case, before the sell notes, counts are displayed for Total Group Available, Group Optimal, Group Blocked, Group Projected, and Group Authorized for the different room types.

Pivot 0 BC Sort Spec

Use this user property to define the sort specification while displaying the available data.

Value	Start Date, Room Type (DESCENDING), Room Name
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property is used to define the sort specification while displaying the available data. The sort specification can be changed by modifying the value with appropriate fields.

ROH Main Search Spec Field Name

Use this user property to check the availability functionality for Run of House rooms.

Value	ROH Main Search Spec
Parent Object Type	TNT SHM Quote Room Block Summary DyncPivot, TNT SHM Revised Room Block Booking, TNT SHM Quote Room Block Line Items, TNT SHM FSI Booking business components
Usage	This user property is used in conjunction with the ROH Sub Search Spec Field Name user property. This user property is used to check the availability of Run of House rooms.

ROH Sub Search Spec Field Name

Use this user property to check the availability functionality for Run of House rooms.

Value	ROH Sub Search Spec
Parent Object Type	TNT SHM Quote Room Block Summary DyncPivot, TNT SHM Revised Room Block Booking, TNT SHM Quote Room Block Line Items, TNT SHM FSI Booking business components
Usage	This user property is used in conjunction with the ROH Main Search Spec Field Name user property. This user property is used to check the availability of Run of House rooms.

User Properties for Sleeping Room Taxes and Service Charges

This topic describes the user properties supported for the Sleeping Room Taxes and Service Charges functionality of Oracle's Siebel Hospitality. This topic describes the following business component user properties:

- *Calculate Tax & Service Charges for Room*
- *Consider Complimentary*
- *TNT SHM Calc Revenue For Which Field*
- *TNT SHM Total Service Charge Amount Field*
- *TNT SHM Total Tax Amount Field*
- *TNT SHM Weekend Total Service Charge Amount Field*
- *TNT SHM Weekend Total Tax Amount Field*

Calculate Tax & Service Charges for Room

Use this user property to determine whether or not to calculate taxes and service charges for sleeping rooms.

Value	Y
Parent Object Type	TNT SHM Room block Rates, TNT SHM Room block Rates Pending business components
Usage	This user property is used to decide whether or not to calculate taxes and service charges for sleeping rooms. This user property has a value of Y to calculate taxes and service charges, and a value of N to not to calculate taxes and service charges.

Consider Complimentary

Use this user property to determine whether or not the complimentary quantity must be considered when negotiated sleeping rooms records are generated.

Value	Function Status;Quote Status
Parent Object Type	TNT SHM Room block Rates, TNT SHM Room block Rates Pending business components
Usage	This user property is used to decide whether or not the complimentary quantity must be considered when negotiated sleeping rooms records are generated. This user property has a value of Y to consider the complimentary quantity, and a value of N to not consider the complimentary quantity.

TNT SHM Calc Revenue For Which Field

Use this user property to indicate which amount taxes and service charges must be calculated for.

Value	ForAdjusted
Parent Object Type	TNT SHM Room block Rates, TNT SHM Room block Rates Pending business components
Usage	This user property is used to indicate which amount taxes and service charges must be calculated for. The default ForAdjusted value calculates the sum of taxes and service charges for the guest invoice. The ForOriginal value calculates the sum of taxes and service charges for the accounting invoice.

TNT SHM Total Service Charge Amount Field

Use this user property to indicate the name of the field in which the weekday service charge amount is stored.

Value	Service Charge Amount
Parent Object Type	TNT SHM Room block Rates, TNT SHM Room block Rates Pending business components
Usage	This user property is used to indicate the name of the field in which the weekday service charge amount is stored.

TNT SHM Total Tax Amount Field

Use this user property to indicate the name of the field in which the weekday tax amount is stored.

Value	Tax Amount
Parent Object Type	TNT SHM Room block Rates, TNT SHM Room block Rates Pending business components
Usage	This user property is used to indicate the name of the field in which the weekday tax amount is stored.

TNT SHM Weekend Total Service Charge Amount Field

Use this user property to indicate the name of the field in which the weekend service charge amount is stored.

Value	Weekend Service Charge Amount
Parent Object Type	TNT SHM Room block Rates, TNT SHM Room block Rates Pending business components
Usage	This user property is used to indicate the name of the field in which the weekend service charge amount is stored.

TNT SHM Weekend Total Tax Amount Field

Use this user property to indicate the name of the field in which the weekend tax amount is stored.

Value	Weekend Tax Amount
Parent Object Type	TNT SHM Room block Rates, TNT SHM Room block Rates Pending business components
Usage	This user property is used to indicate the name of the field in which the weekend tax amount is stored.

User Properties for Pivot Applets

This topic describes the user properties supported for the pivot applets functionality in Siebel Hospitality. This topic covers the following subjects:

- *Applet User Properties for Pivot Applets*
- *Business Component User Properties for Pivot Applets*
- *Virtual Business Component User Properties for Pivot Applets*

Applet User Properties for Pivot Applets

This topic describes the following applet user properties:

- *BC Date Context Field*
- *Button Drilldown*
- *CanModifyLayout*
- *Parent BC Date Context Field*

- *Parent Src Field Default*
- *Popup Applet Name*
- *Popup BC Name*
- *Popup End Date Field*
- *Popup Start Date Field*
- *Refresh Applet*

BC Date Context Field

This user property is used to specify the pivot BC Date field name. This user property is activated when a user clicks the Go To Diary button.

Value	Date
Parent Object Type	TNT SHM SR Inventory Display Dync List Applet - Read Only, TNT SHM SR Inventory Display Dync List Applet - Total Availability, TNT SHM SR Inventory Display Dync List applet, TNT SHM SR Total Avail Room Specific Dync List Applet, TNT SHM SR Total Transient Avail Dync List Applet
Usage	This user property contains the date field name in the pivot business component. This field keeps the date context with the parent business component. For example, if a user clicks the Next Set Column button in the pivot applet, the date column display advances to the next seven days. The same date context is maintained in the parent business component.

Button Drilldown

This user property is used to specify the name of the drill-down object. This user property is activated when a user clicks the Go To Diary button.

Value	Diary Drilldown
Parent Object Type	TNT SHM SR Inventory Display Dync List Applet - Read Only, TNT SHM SR Inventory Display Dync List Applet - Total Availability, TNT SHM SR Inventory Display Dync List applet, TNT SHM SR Total Avail Room Specific Dync List Applet, TNT SHM SR Total Transient Avail Dync List Applet
Usage	This user property is used to specify the name of the drill-down object that has been configured in the applet.

CanModifyLayout

This user property is used to control the display of the Columns Displayed applet menu option.

Value	N
Parent Object Type	TNT SHM Property Projected / Blocked List Applet

Usage	If this user property is set to N, the Columns Displayed menu option is disabled. If this user property is set to Y, the Columns Displayed menu option is enabled.

Parent BC Date Context Field

This user property is used to specify the parent business component date field name. This user property is activated when a user clicks the Go To Diary button.

Value	Search Sleeping Room Date
Parent Object Type	TNT SHM SR Inventory Display Dync List Applet - Read Only, TNT SHM SR Inventory Display Dync List Applet - Total Availability, TNT SHM SR Inventory Display Dync List applet, TNT SHM SR Total Avail Room Specific Dync List Applet, TNT SHM SR Total Transient Avail Dync List Applet
Usage	This user property contains the parent business component date field name. This field keeps the date context with the pivot business component. For example, if a user clicks the Next Set Column button in the pivot applet, the date column display advances to the next seven days. The same date context is maintained in the parent business component. This field value is set with the same date in the pivot business component.

Parent Src Field Default

This user property is used to specify the source field name in the source business component. This user property is activated when a user clicks the Go To Diary button.

Value	Id
Parent Object Type	TNT SHM SR Inventory Display Dync List Applet - Read Only, TNT SHM SR Inventory Display Dync List Applet - Total Availability, TNT SHM SR Inventory Display Dync List applet, TNT SHM SR Total Avail Room Specific Dync List Applet, TNT SHM SR Total Transient Avail Dync List Applet
Usage	This user property contains the source field name in the parent business component. This field is used to query the child business component in the Destination view.

Popup Applet Name

This user property specifies the name of the applet that is used to display records.

Value	TNT SHM Property Special Dates / Sell Notes Popup Applet
Parent Object Type	TNT SHM Function Space Inventory DyncPivot List Applet, TNT SHM Property Pricing - FS Full Day Discount Pivot Applet, TNT SHM Property Pricing - Function Space Pivot Applet, TNT SHM Property Pricing - Sleeping Room Government Pivot Applet, TNT SHM Property Pricing - Sleeping Room Pivot Applet

Usage	This user property is used to specify the pop-up applet name. This user property displays the records from the business component defined by the *Popup BC Name* user property.

Popup BC Name

This user property specifies the name of the business component that displays the records in the applet specified by the *Popup Applet Name* user property.

Value	TNT SHM Property Special Dates Action
Parent Object Type	TNT SHM Function Space Inventory DyncPivot List Applet, TNT SHM Property Pricing - FS Full Day Discount Pivot Applet, TNT SHM Property Pricing - Function Space Pivot Applet, TNT SHM Property Pricing - Sleeping Room Government Pivot Applet, TNT SHM Property Pricing - Sleeping Room Pivot Applet
Usage	This user property specifies the name of the business component that displays the records in the applet specified by the *Popup Applet Name* user property.

Popup End Date Field

This user property is used to specify the end date field name.

Value	End Date
Parent Object Type	TNT SHM Function Space Inventory DyncPivot List Applet, TNT SHM Property Pricing - FS Full Day Discount Pivot Applet, TNT SHM Property Pricing - Function Space Pivot Applet, TNT SHM Property Pricing - Sleeping Room Government Pivot Applet, TNT SHM Property Pricing - Sleeping Room Pivot Applet
Usage	This user property is used to specify the end date field name. This field is used to prepare the date range search specification on the business component specified by the *Popup BC Name* user property.

Popup Start Date Field

This user property is used to specify the start date field name.

Value	Start Date
Parent Object Type	TNT SHM Function Space Inventory DyncPivot List Applet, TNT SHM Property Pricing - FS Full Day Discount Pivot Applet, TNT SHM Property Pricing - Function Space Pivot Applet, TNT SHM Property Pricing - Sleeping Room Government Pivot Applet, TNT SHM Property Pricing - Sleeping Room Pivot Applet
Usage	This user property is used to specify the start date field name. This field is used to prepare the date range search specification on the business component specified by the *Popup BC Name* user property.

Refresh Applet

This user property is used to refresh the applet.

Value	Y
Parent Object Type	TNT SHM SR Inventory Display Dync List applet
Usage	If this user property is set to Y, the applet is refreshed after records have been written to the applet. If this user property is set to N, the applet is not refreshed after records have been written to the applet.

Business Component User Properties for Pivot Applets

This topic describes the following business component user properties:

- *BC Name Field*
- *BO Name Field*
- *Column Name Field*
- *Dyn Field Name Field*
- *Enable Single Button Toggle*
- *Method Name 1*
- *Undo Method Name 1*
- *WithTentative:Undo Method Name*
- *WithoutTentative:Field Name*
- *WithoutTentative:Status*
- *WithoutTentative:Undo Method Name*
- *Pivot 0 Aggregate Type*
- *Pivot 0 BC Name*
- *Pivot 0 BC Search Spec*
- *Pivot 0 BC Sort Spec*
- *Pivot 0 BO Name*
- *Pivot 0 Can Update*
- *Pivot 0 Dynamic Field*
- *Pivot 0 Group Field*
- *Pivot 0 Parent Filter Field 0*
- *Pivot 0 Parent Filter Field 1*
- *Pivot 0 Type 0*
- *Pivot 0 Type 1*

- *Pivot 0 Type 2*
- *Pivot 0 Type 3*
- *Pivot 0 Type 4*
- *Pivot 1 Aggregate Type*
- *Pivot 1 BC Name*
- *Pivot 1 BC Search Spec*
- *Pivot 1 BO Name*
- *Pivot 1 Dynamic Field*
- *Pivot 1 Group Field*
- *Pivot 1 Parent Filter Field 0*
- *Pivot 1 Parent Filter Field 1*
- *Pivot 1 Type 0*
- *Pivot 1 Type 0 Sub Group 0*
- *Pivot 1 Type 1*
- *Pivot 1 Type 2*
- *Pivot 1 Type 2 Sub Group 0*
- *Pivot 2 Aggregate Type*
- *Pivot 2 BC Name*
- *Pivot 2 BC Search Spec*
- *Pivot 2 BO Name*
- *Pivot 2 Dynamic Field*
- *Pivot 2 Group Field*
- *Pivot 2 Parent Filter Field 0*
- *Pivot 2 Parent Filter Field 1*
- *Pivot 2 Type 0*
- *Pivot 2 Type 1*
- *Pivot 2 Type 2*
- *Pivot 2 Type 3*
- *Pivot Calc Type 0*
- *Pivot Date Range*
- *Pivot Dynamic Field Format*
- *Pivot LOV Type*
- *Pivot Static Field 0*
- *Pivot Static Field 1*
- *Pivot Static Field 2*
- *Room Name Field*
- *Total Availability Applet Name*

- *Pivot Calc Type 1*
- *Pivot Calc Type 2*
- *Pivot Calc Type 3*
- *Pivot Calc Type 4*
- *Pivot 0 Group by Group Field*
- *Pivot 0 Type 5*
- *Pivot 0 Type 6*
- *Pivot 0 Type 7*
- *Pivot 0 Type 8*
- *Pivot Static Field 3*
- *DCPivot Attribute LOV Name*
- *DCPivot Attribute List 0*
- *DCPivot Attribute List 1*
- *DCPivot Attribute List 2*
- *DCPivot DC Field Format*
- *DCPivot DC Set Size*
- *DCPivot DC Totals Field*
- *DCPivot DC Unit Size*
- *DCPivot Data Bus Comp*
- *DCPivot Data Search Spec*
- *DCPivot Default DC DataType*
- *DCPivot Default DC FieldName*
- *DCPivot Group Key List 0*
- *DCPivot Update Primary BC*
- *TNT AvoidBookmark*

BC Name Field

This user property is used to store the name of a field defined in the business component.

Value	BC Name
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used to store the name of a field defined in the business component. For example, if a business component contains multiple data business components, BC Name is stored as multiple values that are derived from the respective data business components. For example, if this VBC contains multiple data business components, the respective data BC Names are stored in the BC Name field.

BO Name Field

This user property is used to store the name of a field defined in the business component.

Value	BO Name
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used to store the name of a field defined in the business component. For example, if this VBC contains multiple data business objects, the respective data BO Names are stored in the BO Name field.

Column Name Field

This user property is used to store the name of a field defined in the business component.

Value	Column Name
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property is used to store the name of a field defined in the business component. In the specified business components, multiple columns are displayed in dynamic rows. For example, the corresponding Group Forecast, Group Authorized, and Capacity LOV values are displayed in the user interface. Consequently, this user property is used in code to temporarily read those values.

Dyn Field Name Field

This user property is used to store the name of the dynamic field in the specified data business component.

Value	Dyn Field Name
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used to store the name of the dynamic field in the specified data business component. For example, in this business component, the dynamic field name is Start Date for all the data business components.

Enable Single Button Toggle

This user property is used to enable or disable the functionality to switch the With Tentative/Without Tentative button between the two labels.

Value	Y
Parent Object Type	TNT SHM SR Inventory Dync

Usage	When set to Y, this user property enables the functionality to switch the With Tentative/Without Tentative button between the two labels. When set to N, this user property disables the functionality to switch the With Tentative/Without Tentative button between the two labels.

Method Name 1

This user property determines the value of the With Tentative/Without Tentative button label. This user property is a continuation of the *Enable Single Button Toggle* user property.

Value	WithoutTentative
Parent Object Type	TNT SHM SR Inventory Dync
Usage	The With Tentative/Without Tentative button label is determined by the value of this user property. By default, the button label is the WithoutTentative LOV value, which displays the Without Tentative label on the button. You can configure more such buttons in the user interface and add more user properties such as Method Name 2 and so on.

Undo Method Name 1

This user property changes the label of the With Tentative/Without Tentative button from Without Tentative to With Tentative. This user property is a continuation of the *Method Name 1* user property.

Value	WithTentative
Parent Object Type	TNT SHM SR Inventory Dync
Usage	When a user clicks the Without Tentative button, this user property calls the WithTentative method, which changes the button label to With Tentative.

WithTentative:Undo Method Name

This user property changes the label of the With Tentative/Without Tentative button from With Tentative to Without Tentative. This user property is a continuation of the *Undo Method Name 1* user property.

Value	WithoutTentative
Parent Object Type	TNT SHM SR Inventory Dync
Usage	When a user clicks the With Tentative button, this user property calls the WithoutTentative method, which changes the button label to Without Tentative.

WithoutTentative:Field Name

This user property runs the data business component specified by the value of the Tentative Flag field in the TNT SHM Quote Room Block Line Items Aggr business component.

Value	Tentative Flag
Parent Object Type	TNT SHM SR Inventory Dync
Usage	The Tentative Flag field in the TNT SHM Quote Room Block Line Items Aggr business component has a value of Y for With Tentative and a value of N for Without Tentative. According to the Tentative Flag field value, this user property runs the appropriate data business component.

WithoutTentative:Status

When the With Tentative/Without Tentative button is in Without Tentative display mode, this user property excludes records with a Status values of T1 and T2.

Value	T1;T2;
Parent Object Type	TNT SHM SR Inventory Dync
Usage	When the With Tentative/Without Tentative button is in Without Tentative display mode, this user property excludes records with a Status values of T1 and T2 (that is, tentative records) from the display.

WithoutTentative:Undo Method Name

When a user clicks the Without Tentative button, this user property changes the button label to With Tentative. This user property is a continuation of the *WithTentative:Undo Method Name* user property.

Value	WithTentative;
Parent Object Type	TNT SHM SR Inventory Dync
Usage	When a user clicks the Without Tentative button, this user property changes the button label to With Tentative. The WithTentative method is called when a user clicks the button.

Pivot 0 Aggregate Type

This user property is used to aggregate the Total values horizontally.

Value	0

Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property is used to aggregate the Total values horizontally. If the value of this user property is 1, it creates a row with the label Total and displays the total of all the attribute values in two separate rows.

Pivot 0 BC Name

This user property contains the name of the business component in which the displayed data is stored.

Value	TNT SHM FSI Auth Lvl
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property contains the name of the business component in which the displayed data is stored.

Pivot 0 BC Search Spec

This user property contains the search specification to apply to the business component in which the displayed data is stored.

Value	([Room Type] = LookupValue(PRODUCT_TYPE, 'Sleeping Room') OR [Room Type] = LookupValue(PRODUCT_TYPE, 'ROH Sleeping Room'))
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property contains the search specification to apply to the business component in which the displayed data is stored.

Pivot 0 BC Sort Spec

This user property contains the sort specification to apply to the business component in which the displayed data is stored.

Value	Start Date, Room Type (DESCENDING), Room Name
Parent Object Type	TNT SHM SR Inventory Dync

Usage	This user property contains the sort specification to apply to the business component in which the displayed data is stored.

Pivot 0 BO Name

This user property contains the name of the business object that contains the business component in which the displayed data is stored.

Value	SHM Site
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync,TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property contains the name of the business object that contains the business component in which the displayed data is stored.

Pivot 0 Can Update

This user property sets the various column values in dynamic rows.

Value	Y
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property sets the various column values in dynamic rows.

Pivot 0 Dynamic Field

This user property specifies a field, the value of which is displayed as dynamic columns.

Value	StartDate
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property specifies a field, the value of which is displayed as dynamic columns. This field is present in the data business component.

Pivot 0 Group Field

This user property specifies the data business component field, the value of which is used to group the data in the applet.

Value	Room Name
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property specifies the data business component field, the value of which is used to group the data in the applet.

Pivot 0 Parent Filter Field 0

This user property is used to apply the parent search specification to the data business component.

Value	Date;Search Sleeping Room Date
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type
Usage	This user property is used to apply the parent search specification to the data business component. The value of the Search Sleeping Room Date field in the SHM Site business component is used to apply the search specification.

Pivot 0 Parent Filter Field 1

This user property is used to apply the parent search specification to the data business component.

Value	Day Of Week;Search Day Of Week
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Type Dync - Group By Type
Usage	This user property is used to apply the parent search specification to the data business component. For example, the value of the Search Day Of Week field in the SHM Site business component is used to apply the search specification.

Pivot 0 Type 0

This user property specifies the attributes that are displayed in the applet.

Value	Total Group Available;1;Total Group Available;1
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 0 Type 1

This user property specifies the attributes that are displayed in the applet.

Value	Group Optimal;1;Optimal Level;1
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 0 Type 2

This user property specifies the attributes that are displayed in the applet.

Value	Capacity;0;Room Capacity;0
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 0 Type 3

This user property specifies the attributes that are displayed in the applet.

Value	Transient Booked;0;Transient Booked;0
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 0 Type 4

This user property specifies the attributes that are displayed in the applet.

Value	Total Group Available;1;Total Group Available;1
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 1 Aggregate Type

This user property is used to aggregate the Total horizontally.

Value	0
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync
Usage	This user property is used to aggregate the Total values horizontally. If the value of this user property is 1, it creates a row with the label Total and displays the total of all the attribute values in two separate rows.

Pivot 1 BC Name

This user property contains the name of the business component in which the displayed data is stored.

Value	TNT SHM Quote Room Block Line Items Aggr
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail DyncUsage
Usage	This user property contains the name of the business component in which the displayed data is stored.

Pivot 1 BC Search Spec

This user property contains the search specification to apply to the business component in which the displayed data is stored.

Value	([Room Type] = LookupValue(PRODUCT_TYPE, 'Sleeping Room') OR [Room Type] = LookupValue(PRODUCT_TYPE, 'ROH Sleeping Room'))
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync
Usage	This user property contains the search specification to apply to the business component in which the displayed data is stored.

Pivot 1 BO Name

This user property contains the name of the business object that contains the business component in which the displayed data is stored.

Value	Quote
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync
Usage	This user property contains the name of the business object that contains the business component in which the displayed data is stored.

Pivot 1 Dynamic Field

This user property specifies a field, the value of which is displayed as dynamic columns.

Value	Start Date
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync
Usage	This user property specifies a field, the value of which is displayed as dynamic columns. This field is present in the data business component.

Pivot 1 Group Field

This user property is used to specify a data business component field, the value of which is used to group the data in the applet.

Value	Status
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Transient Avail Dync
Usage	This user property is used to specify a data business component field, the value of which is used to group the data in the applet.

Pivot 1 Parent Filter Field 0

This user property is used to apply the parent search specification to the data business component.

Value	Date;Search Sleeping Room Date
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync
Usage	This user property is used to apply the parent search specification to the data business component. The value of the Search Sleeping Room Date field in the SHM Site business component is used to apply the search specification to the data business component.

Pivot 1 Parent Filter Field 1

This user property is used to apply the parent search specification to the data business component.

Value	Day Of Week;Search Day Of Week
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the TNT SHM SR Total Avail Room Specific Dync business component.

Usage	This user property is used to apply the parent search specification to the data business component. For example, the value of the Search Day Of Week field in the SHM Site business component is used to apply search specification to the data business component.

Pivot 1 Type 0

This user property specifies the attributes that are displayed in the applet.

Value	Group Blocked;1;Exact Blocked;1
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 1 Type 0 Sub Group 0

This user property is used to create subgroups.

Value	Definite/Hold;[Status]=LookupValue("TNT_FUNC_STATUS","Definite") OR [Status]=LookupValue("TNT_FUNC_STATUS","Hold")
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used for sub-grouping. This user property is used in conjunction with the *Pivot 1 Type 0* user property to create subgroups of the dynamic records.

Pivot 1 Type 1

This user property specifies the attributes that are displayed in the applet.

Value	Group Picked Up;0;Picked Up;0
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync

Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 1 Type 2

This user property specifies the attributes that are displayed in the applet.

Value	Group Projected;1;Exact Projected;1
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 1 Type 2 Sub Group 0

This user property is used to create subgroups.

Value	Definite/Hold;[Status]=LookupValue("TNT_FUNC_STATUS","Definite") OR [Status]=LookupValue("TNT_FUNC_STATUS","Hold")
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used for sub-grouping. This user property is used in conjunction with the *Pivot 1 Type 2* user property to create subgroups of the dynamic records.

Pivot 2 Aggregate Type

This user property is used to aggregate the Total horizontally.

Value	0
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used to aggregate the Total values horizontally. If the value of this user property is 1, it creates a row with the label Total and displays the total of all the attribute values in two separate rows.

Pivot 2 BC Name

This user property contains the name of the business component in which the displayed data is stored.

Value	TNT SHM FSI Auth Lvl
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property contains the name of the business component in which the displayed data is stored.

Pivot 2 BC Search Spec

This user property contains the search specification to apply to the business component in which the displayed data is stored.

Value	([Room Type] = LookupValue(PRODUCT_TYPE, 'Sleeping Room') OR [Room Type] = LookupValue(PRODUCT_TYPE, 'ROH Sleeping Room'))
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property contains the search specification to apply to the business component in which the displayed data is stored.

Pivot 2 BO Name

This user property contains the name of the business object that contains the business component in which the displayed data is stored.

Value	SHM Site
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property contains the name of the business object that contains the business component in which the displayed data is stored.

Pivot 2 Dynamic Field

This user property specifies a field, the value of which is displayed as dynamic columns.

Value	Start Date
Parent Object Type	TNT SHM SR Inventory Dync

Usage	This user property specifies a field, the value of which is displayed as dynamic columns. This field is present in the data business component.

Pivot 2 Group Field

This user property is used to specify a data business component field, the value of which is used to group the data in the applet.

Value	Room Name
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used to specify a data business component field, the value of which is used to group the data in the applet.

Pivot 2 Parent Filter Field 0

This user property is used to apply the parent search specification to the data business component.

Value	Date;Search Sleeping Room Date
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used to apply the parent search specification to the data business component. The value of the Search Sleeping Room Date field in the SHM Site business component is used to apply the search specification to the data business component.

Pivot 2 Parent Filter Field 1

This user property is used to apply the parent search specification to the data business component.

Value	Day Of Week;Search Day Of Week
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property is used to apply the parent search specification to the data business component. For example, the value of the Search Day Of Week field in the SHM Site business component is used to apply the search specification to the data business component.

Pivot 2 Type 0

This user property specifies the attributes that are displayed in the applet.

Value	Group Authorized;1;Authorization Level;1

Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 2 Type 1

This user property specifies the attributes that are displayed in the applet.

Value	Group Optimal;1;Optimal Level;1
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 2 Type 2

This user property specifies the attributes that are displayed in the applet.

Value	Capacity;0;Room Capacity;0
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 2 Type 3

This user property specifies the attributes that are displayed in the applet.

Value	Transient Booked;0;Transient Booked;0
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot Calc Type 0

This user property is used to create records for specialized calculated row types from an already-aggregated value.

Value	Total Group Available
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync
Usage	This user property is used to create records for specialized calculated row types from an already-aggregated value. The calculated expression can be given as a value, or as the calculated business component field name from the data business component.

Pivot Date Range

This user property is used to specify the date range.

Value	7
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property is used to specify the date range. The value 7 means that the pivot applet displays the dynamic date columns for the next seven dates. In other words, the display shows the current date plus the next seven dates.

Pivot Dynamic Field Format

This user property specifies the display format of the dynamic field.

Value	%a %d %b, %y
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the display format of the dynamic field. The dynamic field is Start Date, which is displayed in the format {Sun 21 Nov, 10}. If the value of this user property is [%a %m/%d/%y], the Start Date field value is displayed in the format {Sun 11/21/10}.

Pivot LOV Type

This user property specifies the LOV Type used for various attributes that are displayed in the pivot applet.

Value	TNT_SHM_SR_AVAIL_PIVOT
Parent Object Type	TNT SHM SR Inventory Dync The same user property is also available with different values in the following business components: TNT SHM FSI Category Valid Authorization VBC, TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the LOV Type used for various attributes that are displayed in the pivot applet.

Pivot Static Field 0

This user property specifies the fields in the pivot business component that are mapped with applet list columns.

Value	Type
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property specifies the fields in the pivot business component that are mapped with applet list columns.

Pivot Static Field 1

This user property specifies the fields in the pivot business component that are mapped with applet list columns.

Value	Property ID
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property specifies the fields in the pivot business component that are mapped with applet list columns.

Pivot Static Field 2

This user property specifies the fields in the pivot business component that are mapped with applet list columns.

Value	Date

Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM SR Total Avail Dync, TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Total Group Avail Dync, TNT SHM SR Total Transient Avail Dync, TNT SHM SR Type Dync - Group By Type, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property specifies the fields in the pivot business component that are mapped with applet list columns.

Room Name Field

This user property is used to store the name of a field defined in the business component.

Value	Room Name
Parent Object Type	TNT SHM SR Inventory Dync, TNT SHM FSI Category Valid Authorization VBC
Usage	This user property is used to store the name of a field defined in the business component. While displaying records in the pivot applet, this variable is used to store room block names.

Total Availability Applet Name

This user property specifies the name of the applet that displays the pivot records.

Value	TNT SHM SR Inventory Display Dync List Applet - Total Availability
Parent Object Type	TNT SHM SR Inventory Dync
Usage	This user property specifies the name of the applet that displays the pivot records.

Pivot Calc Type 1

This user property is used to create records for specialized calculated row types from an already-aggregated value.

Value	Total Booked
Parent Object Type	TNT SHM SR Total Avail Dync
Usage	This user property is used to create records for specialized calculated row types from an already-aggregated value. The calculated expression can be given as a value, or as the calculated business component field name from the data business component.

Pivot Calc Type 2

This user property is used to create records for specialized calculated row types from an already-aggregated value.

Value	Total Available
Parent Object Type	TNT SHM SR Total Avail Dync
Usage	This user property is used to create records for specialized calculated row types from an already-aggregated value. The calculated expression can be given as a value, or as the calculated business component field name from the data business component.

Pivot Calc Type 3

This user property is used to create records for specialized calculated row types from an already-aggregated value.

Value	Occupied Percent
Parent Object Type	TNT SHM SR Total Avail Dync
Usage	This user property is used to create records for specialized calculated row types from an already-aggregated value. The calculated expression can be given as a value, or as the calculated business component field name from the data business component.

Pivot Calc Type 4

This user property is used to create records for specialized calculated row types from an already-aggregated value.

Value	Actual Available
Parent Object Type	TNT SHM SR Total Avail Dync
Usage	This user property is used to create records for specialized calculated row types from an already-aggregated value. The calculated expression can be given as a value, or as the calculated business component field name from the data business component.

Pivot 0 Group by Group Field

If the value of this user property is Y, then the field specified by the Pivot 0 Group Field is used for grouping.

Value	Y
Parent Object Type	TNT SHM SR Total Avail Room Specific Dync, TNT SHM SR Type Dync - Group By Type
Usage	If the value of this user property is Y, then the field specified by the Pivot 0 Group Field is used for grouping, rather than the Pivot 0 Type 0 values.

Pivot 0 Type 5

This user property specifies the attributes that are displayed in the applet.

Value	Group Projected;1;Projected;1
Parent Object Type	TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 0 Type 6

This user property specifies the attributes that are displayed in the applet.

Value	Definite/T1 Projected;1;Projected D/T1;1
Parent Object Type	TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 0 Type 7

This user property specifies the attributes that are displayed in the applet.

Value	Group Picked Up;1;Picked Up;1
Parent Object Type	TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot 0 Type 8

This user property specifies the attributes that are displayed in the applet.

Value	Total Group Available;1;Total Group Available;1
Parent Object Type	TNT SHM SR Type Dync - Group By Type

Usage	This user property specifies the attributes that are displayed in the applet. The first argument indicates the LOV value to be displayed in the user interface as an attribute. The second argument identifies the data business component field name.

Pivot Static Field 3

This user property specifies the fields in the pivot business component that are mapped with applet list columns.

Value	Group field
Parent Object Type	TNT SHM SR Type Dync - Group By Type
Usage	This user property specifies the fields in the pivot business component that are mapped with applet list columns.

DCPivot Attribute LOV Name

This user property specifies the LOV Type used for various attributes that are displayed in the pivot applet.

Value	TNT_SHM_DYNC_PIVOT_ATTRIB
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property specifies the LOV Type used for various attributes that are displayed in the pivot applet.

DCPivot Attribute List 0

This user property is used to specify the first attribute to be displayed in the pivot applet for all the dynamic columns.

Value	Authorization Level
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked

Usage	This user property is used to specify the first attribute to be displayed in the pivot applet for all the dynamic columns. The display value from the TNT_SHM_DYNC_PIVOT_ATTRIB LOV Type for this value is used as the attribute.

DCPivot Attribute List 1

This user property is used to specify the second attribute to be displayed in the pivot applet for all the dynamic columns.

Value	Max Overbook Level
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property is used to specify the second attribute to be displayed in the pivot applet for all the dynamic columns. The display value from the TNT_SHM_DYNC_PIVOT_ATTRIB LOV Type for this value is used as the attribute.

DCPivot Attribute List 2

This user property is used to specify the third attribute to be displayed in the pivot applet for all the dynamic columns.

Value	Max Option Level
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - Sleeping Room Pivot VBC
Usage	This user property is used to specify the third attribute to be displayed in the pivot applet for all the dynamic columns. The display value from the TNT_SHM_DYNC_PIVOT_ATTRIB LOV Type for this value is used as the attribute.

DCPivot DC Field Format

This user property is used to specify the display format of the dynamic field.

Value	%a %d %b, %y
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot, TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked

Usage	This user property is used to specify the display format of the dynamic field. The dynamic field is Start Date, which is displayed in the format {Sun 21 Nov, 10}. If the value of this user property is [%a %m/%d/%y], the Start Date field value is displayed in the format {Sun 11/21/10}.

DCPivot DC Set Size

This user property is used to control the number of date columns that are displayed.

Value	8
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot, TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property is used to control the number of date columns that are displayed. This user property displays columns from the current date plus this value. When the value of this user property is 8, the view displays nine columns, one for the current date and one for each of the eight subsequent dates.

DCPivot DC Totals Field

This user property is used in conjunction with the *DCPivot DC Vertical Totals* user property.

Value	Rooms
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property is used with conjunction of the *DCPivot DC Vertical Totals* user property. If this user property and the DCPivot DC Vertical Totals user property are both set to Y, a vertical row is created for Total with the label Total in one of the cells.

DCPivot DC Unit Size

This user property is used to calculate the date range.

Value	1
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot, TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked

Usage	This user property is used to calculate the date range. The value of this user property indicates what the next dynamic column will be. If the value of this user property is 1, the difference between the date columns is one day.

DCPivot Data BusComp

This user property contains the name of the business component in which the displayed data is stored.

Value	TNT SHM FSI Auth Lvl
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC', TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property contains the name of the business component in which the displayed data is stored.

DCPivot Data Search Spec

This user property contains the search specification to apply to the business component in which the displayed data is stored.

Value	[Room Type] <> LookupValue('PRODUCT_TYPE', 'Sleeping Room')
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available in the following business components that have the following value: ([Inventory Status] = LookupValue("TNT_SHM_INV_STATUS", "Actualized") OR [Inventory Status] = LookupValue("TNT_SHM_INV_STATUS", "Reserved")) TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC', TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property contains the search specification to apply to the business component in which the displayed data is stored.

DCPivot Default DC DataType

This user property specifies the default data type for dynamic columns.

Value	10

Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot, TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property specifies the default data type for dynamic columns.

DCPivot Default DC FieldName

This user property specifies the default dynamic field name for dynamic columns.

Value	Start Date
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC', TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property specifies the default dynamic field name for dynamic columns.

DCPivot Group Key List 0

This user property is used to specify a data business component field, the value of which is used to group the data in the applet.

Value	Room Name
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC', TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property is used to specify a data business component field, the value of which is used to group the data in the applet.

DCPivot Update Primary BC

If this user property is set to Y, it goes through each column of the current virtual record, reads the value of each cell, and updates the value that corresponds to the data business component.

Value	Y

Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot The same user property is also available with different values in the following business components: TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC', TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC
Usage	If this user property is set to Y, it goes through each column of the current virtual record, reads the value of each cell, and updates the value that corresponds to the data business component.

TNT AvoidBookmark

This user property is related to printing functionality.

Value	Y
Parent Object Type	TNT SHM Function Space Inventory Dynamic Pivot, TNT SHM Property Projected / Blocked
Usage	This user property is related to printing functionality. In the case of dynamic data, this user property is used to avoid the re-execution of the business component and to maintain the context of the dynamic data.

Virtual Business Component User Properties for Pivot Applets

This topic describes the following virtual business component user properties:

- *DCPivot Aggregation*
- *DCPivot Attribute List 3*
- *DCPivot Attribute List 4*
- *DCPivot Attribute Read-Only List 0*
- *DCPivot Attribute Read-Only List 1*
- *DCPivot Data BusComp Link*
- *DCPivot DC Horizontal Totals*
- *DCPivot DC Vertical Totals*
- *DCPivot Group Key List 1*
- *DCPivot Group Key List 2*
- *DCPivot Parent Search Field*
- *Field Read Only Field: Authorization Level*
- *Sum BC Name*
- *Sum Field 1*
- *Sum Field 2*

- *Sum Field 3*
- *Sum Field 4*
- *Sum Field 5*
- *Sum Key Field 1*
- *Sum Key Field 2*

DCPivot Aggregation

This user property is used to aggregate the Total horizontally.

Value	N
Parent Object Type	TNT SHM Property Pricing - FS Full Day Discount Pivot VBC The same user property is also available with different values in the following business components: TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property is used to aggregate the Total values horizontally. This user property creates a row with the label Total and displays the total of all the attribute values in two separate rows.

DCPivot Attribute List 3

This user property is used to specify one of the attributes to be displayed in the pivot applet for all the dynamic columns.

Value	Maximum
Parent Object Type	TNT SHM Property Pricing - Sleeping Room Pivot VBC
Usage	This user property is used to specify one of the attributes to be displayed in the pivot applet for all the dynamic columns.

DCPivot Attribute List 4

This user property is used to specify one of the attributes to be displayed in the pivot applet for all the dynamic columns.

Value	Cost
Parent Object Type	TNT SHM Property Pricing - Sleeping Room Pivot VBC
Usage	This user property is used to specify one of the attributes to be displayed in the pivot applet for all the dynamic columns.

DCPivot Attribute Read-Only List 0

This user property is used to specify a field in the pivot applet that is read only.

Value	Rental
Parent Object Type	TNT SHM Property Pricing - FS Full Day Discount Pivot VBC The same user property is also available with different values in the following business components: TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property is used to specify a field in the pivot applet that is read only.

DCPivot Attribute Read-Only List 1

This user property is used to specify a field in the pivot applet that is read only.

Value	Threshold
Parent Object Type	TNT SHM Property Pricing - FS Full Day Discount Pivot VBC The same user property is also available with different values in the following business components: TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property is used to specify a field in the pivot applet that is read only.

DCPivot Data BusComp Link

This user property specifies the name of the link.

Value	SHM Site/TNT SHM Property Pricing - FS Full Day Discount
Parent Object Type	TNT SHM Property Pricing - FS Full Day Discount Pivot VBC, TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property specifies the name of the link.

DCPivot DC Horizontal Totals

If the value of this user property is Y, a column named Total is created and displays the total of values for that record.

Value	N
Parent Object Type	TNT SHM Property Pricing - FS Full Day Discount Pivot VBC The same user property is also available with different values in the following business components: TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	If the value of this user property is Y, a column named Total is created and displays the total of values for that record.

DCPivot DC Vertical Totals

If the value of this user property is Y, a row labeled Total is created and displays the total of values for the attributes.

Value	N
Parent Object Type	TNT SHM Property Pricing - FS Full Day Discount Pivot VBC The same user property is also available with different values in the following business components: TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	If the value of this user property is Y, a row labeled Total is created and displays the total of values for the attributes.

DCPivot Group Key List 1

This user property is used to specify the grouping field.

Value	Day Part Name
Parent Object Type	TNT SHM Property Pricing - FS Full Day Discount Pivot VBC The same user property is also available with different values in the following business components: TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property is used to specify the grouping field.

DCPivot Group Key List 2

This user property is used to specify the grouping field.

Value	Rooms

Parent Object Type	TNT SHM Property Projected / Blocked
Usage	This user property is used to specify the grouping field.

DCPivot Parent Search Field

This user property specifies the name of the parent business component field used for the search specification.

Value	Search Sleeping Room Date
Parent Object Type	TNT SHM Property Pricing - FS Full Day Discount Pivot VBC The same user property is also available with different values in the following business components: TNT SHM Property Pricing - Function Space Pivot VBC, TNT SHM Property Pricing - Sleeping Room Government Pivot VBC, TNT SHM Property Pricing - Sleeping Room Pivot VBC, TNT SHM Property Projected / Blocked
Usage	This user property specifies the name of the parent business component field used for the search specification.

Field Read Only Field: Authorization Level

This user property sets a specific field in a business component to be read only.

Value	Read Only - Authorization Level
Parent Object Type	TNT SHM FSI Auth Lvl
Usage	This user property sets a specific field in a business component to be read only. For more information about this user property, see the chapter on user properties in *Siebel Developer's Reference* .

Sum BC Name

This user property specifies the name of the business component that is used to add up the field values specified by user properties such as Sum Field 1, Sum Field 2, and so on.

Value	TNT SHM Quote Room Block Line Items Aggr
Parent Object Type	TNT SHM FSI Auth Lvl
Usage	This user property specifies the name of the business component that is used to add up the field values specified by user properties such as Sum Field 1, Sum Field 2, and so on.

Sum Field 1

This user property specifies the name of the field for which to calculate a sum.

Value	Blocked;Blocked
Parent Object Type	TNT SHM FSI Auth Lvl
Usage	This user property specifies the name of the field for which to calculate a sum. The first attribute is the field name in the business component specified by the *Sum BC Name* user property. The second attribute is the field name in the present business component.

Sum Field 2

This user property specifies the name of the field for which to calculate a sum.

Value	D/T1 Blocked;Blocked D/T1
Parent Object Type	TNT SHM FSI Auth Lvl
Usage	This user property specifies the name of the field for which to calculate a sum. The first attribute is the field name in the business component specified by the *Sum BC Name* user property. The second attribute is the field name in the present business component.

Sum Field 3

This user property specifies the name of the field for which to calculate a sum.

Value	Picked Up;Picked Up
Parent Object Type	TNT SHM FSI Auth Lvl
Usage	This user property specifies the name of the field for which to calculate a sum. The first attribute is the field name in the business component specified by the *Sum BC Name* user property. The second attribute is the field name in the present business component.

Sum Field 4

This user property specifies the name of the field for which to calculate a sum.

Value	Projected;Projected
Parent Object Type	TNT SHM FSI Auth Lvl

Usage	This user property specifies the name of the field for which to calculate a sum. The first attribute is the field name in the business component specified by the *Sum BC Name* user property. The second attribute is the field name in the present business component.

Sum Field 5

This user property specifies the name of the field for which to calculate a sum.

Value	D/T1 Projected;Projected D/T1
Parent Object Type	TNT SHM FSI Auth Lvl
Usage	This user property specifies the name of the field for which to calculate a sum. The first attribute is the field name in the business component specified by the *Sum BC Name* user property. The second attribute is the field name in the present business component.

Sum Key Field 1

This user property is used to uniquely identify the records in the business component specified by the *Sum BC Name* user property.

Value	Start Date
Parent Object Type	TNT SHM FSI Auth Lvl
Usage	This user property is used to uniquely identify the records in the business component specified by the *Sum BC Name* user property.

Sum Key Field 2

This user property is used to uniquely identify the records in the business component specified by the *Sum BC Name* user property.

Value	Room Id
Parent Object Type	TNT SHM FSI Auth Lvl
Usage	This user property is used to uniquely identify the records in the business component specified by the *Sum BC Name* user property.

User Properties for Meeting Packages

This topic describes the user properties supported for the meeting packages functionality of Siebel Hospitality. This topic describes the following user properties:

- *Applet User Properties for the Function Space Diary*
- *Business Component User Properties for the Function Space Diary*
- *Business Component User Property for Opportunities*
- *Applet User Properties for Quotes*
- *Business Component User Properties for Quotes*

Applet User Properties for the Function Space Diary

This topic describes the user properties that support meeting packages functionality in the Function Space Diary applets:

- *Diary User Preferences for End Time*
- *Diary User Preferences for Start Time*
- *Item Color Fields*
- *Item Mouse Over Ids*
- *Item Time TurnTime Toggle BC Method*
- *Restrict Diary BC Date*
- *Retain Unreserve Popup Default*
- *Retain Unreserve Popup Name*
- *Transient Suite Field*
- *Views Having No Space for Icons in Major Axis*
- *Weekend BC Activation Field 1*
- *Weekend BC Activation Field 2*
- *Weekend BC Activation Field 3*
- *Y-Axis Drill Down Enable*
- *Y-Axis Mouse Over Cursor Ids*

Diary User Preferences for End Time

This user property is used to specify the field name that is used in the Diary user preferences for end time control.

Value	End Time
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the field name that is used in the Diary user preferences for end time control.

Diary User Preferences for Start Time

This user property is used to specify the field name that is used in the Diary user preferences for start time control.

Value	Start Time
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the field name that is used in the Diary user preferences for start time control.

Item Color Fields

This user property is used to specify the field name that is present in the Y-axis business component in the Diary.

Value	Compound Inventory Status
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the field name that is present in the Y-axis business component in the Diary. The booking color is displayed in the Diary according to the value of this user property.

Item Mouse Over Ids

This user property is used to control the cursor shape in the Diary when the mouse pointer is hovering.

Value	213;213;213;213
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the parameter for the cursor shape in the Diary when the mouse pointer is hovering.

Item Time TurnTime Toggle BC Method

This user property is used to specify the name of the business component method that displays the turn time conflicts, if any, within the booking.

Value	ShowToggleTurnTime

Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property displays the name of the business component method that displays the turn time conflicts, if any, within the booking.

Restrict Diary BC Date

This user property is used to set the effective dates search specification in the booking business component and display the appropriate active specific spaces.

Value	Y
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	If this user property is set to Y, then it sets the effective dates search specification in the booking business component and displays the appropriate active specific spaces.

Retain Unreserve Popup Default

If the timing for a primary booking is changed, then this user property is used to move the booking to the new time.

Value	Unreserve
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	If the timing for a primary booking is changed, then the primary booking is moved to the new time. If a backup space is booked, then this popup provides the option either to retain the backup booking or Unreserve it.

Retain Unreserve Popup Name

This user property is used to specify the pop-up applet name for *Retain Unreserve Popup Default*.

Value	TNT SHM Retain/Unreserve Popup Applet
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the pop-up applet name for *Retain Unreserve Popup Default*.

Transient Suite Field

This user property is used to disable the right-click context menu if the Type value of a space is Suite.

Value	Is Transient Suite
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property is used to disable the right-click context menu if the Type value of a space is Suite.

Views Having No Space for Icons in Major Axis

This user property is used to list views that have no space for icons.

Value	128;256
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary
Usage	This user property contains a semicolon (;) separated list of views that have no space to display icons.

Weekend BC Activation Field 1

This user property is used to specify the name of a field in the Weekend Admin business component that is activated in the code.

Value	Day of Week
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the name of a field in the Weekend Admin business component that is activated in the code.

Weekend BC Activation Field 2

This user property is used to specify the name of a field in the Weekend Admin business component that is activated in the code.

Value	Weekend Weekday Flag
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet

Usage	This user property specifies the name of a field in the Weekend Admin business component that is activated in the code.

Weekend BC Activation Field 3

This user property is used to specify the name of a field in the Weekend Admin business component that is activated in the code.

Value	Property Id
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the name of a field in the Weekend Admin business component that is activated in the code.

Y-Axis Drill Down Enable

This user property is used to enable or disable drill-down on Y-axis specific spaces.

Value	N
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	If the value of this user property is N, then drill-down on Y-axis specific spaces is disabled.

Y-Axis Mouse Over Cursor Ids

This user property is used to control the cursor shape on the Y-axis when the mouse pointer is hovering.

Value	213;213;213;213
Parent Object Type	TNT SHM Function Space Diary, TNT SHM Compact Function Space Diary, and TNT SHM Function Space Diary Total Availability Applet
Usage	This user property specifies the parameter for the cursor shape on the Y-axis when the mouse pointer is hovering.

Business Component User Properties for the Function Space Diary

This topic describes the user properties that support meeting packages functionality in the Function Space Diary business components:

- *Activation Field 2*
- *Color Code Weekend Type*
- *Default Function Space Type*
- *Default Start Date Time*
- *Editable for TimeScale*
- *GRC View:TNT SHM Site Function Space Diary Total Availability View*
- *Parent StartDate Field*
- *Time Part BC Major*
- *Time Part BC Minor End Date Field*
- *Time Part BC Minor End Time Field*
- *Time Part BC Minor Name Field*
- *Time Part BC Minor Start Date Field*
- *Time Part BC Minor Start Time Field*
- *Time Scale:Day/Day-Part*
- *Time Scale:Day/Half-Hour*
- *Time Scale:Day/Hour*
- *Time Scale:Day/Quarter-Hour*
- *Time Scale:Month/Day*
- *Time Scale:Month/Day-of-Week*
- *Time Scale:Month/Day-of-Week/Day Part*
- *Time Scale:Week/Day*
- *Time Scale:Week/Day/Day Part*
- *TNT SHM Site Function Space Diary Total Availability View:BC 1*
- *Total Availability Applet Name*
- *Use Working Hours*
- *X-Axis Drill Down Enable*

Activation Field 2

This user property is used to specify the fields to be activated in the business component when the Diary is initialized.

Value	Function Space Type - Query
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component

Usage	This user property is used to specify the fields to be activated in the TNT SHM Gantt AX Date Time Interval PopUp business component, in the Function Space Diary screen, when the Diary applet is initialized.

Color Code Weekend Type

Use this user property to define the type of day to which the Weekend color code type is mapped in the Function Space Diary.

Value	Weekend
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	Each color code type has a different color, and each color must be mapped to a particular day type to identify those days in the Function Space Diary. The default value is Weekend.

Default Function Space Type

This user property is used to provide the default value for the Function Space Type field.

Value	Specific Space
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property is used to provide the default value for the Function Space Type field.

Default Start Date Time

This user property is used to provide the default value for the Start Date field.

Value	*Null*
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property is used to provide the default value for the Start Date field. If this value is empty, then the default value of this field is the Date Threaded field value, if any. Otherwise, the default value of the Start Date field is the current date.

Editable for TimeScale

This user property is used to specify whether or not the bookings are editable in each time scale.

Value	1;N;2;N;4;Y;8;Y;16;Y;32;N;64;N;128;N;256;N
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property is used to specify whether or not the bookings are editable in each time scale.

GRC View:TNT SHM Site Function Space Diary Total Availability View

This user property is used to specify whether or not to refresh the other applets in the Function Space Diary views. This user property is used in conjunction with the Item BC Search Space applet user property.

Value	Y
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property is used to specify whether or not to refresh the other applets in the Function Space Diary views. This user property is used in conjunction with the Item BC Search Space applet user property.

Parent StartDate Field

This user property is used to specify the Start Date field name in the parent business component.

Value	Start Date
Parent Object Type	TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property specifies the Start Date field name in the parent business component.

Time Part BC Major

This user property is used to specify the list of values in which day parts are displayed. Use this user property to retrieve the time part details for a property in the Function Space Diary.

Value	*Null*

Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property is used to specify the list of values in which day parts are displayed. This user property retrieves the time part details for a property, and indicates whether or not to display the time part details on the appropriate time scale in the Function Space Diary.

Time Part BC Minor End Date Field

Use this user property to retrieve the End Date for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component.

Value	End Date
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property retrieves the End Date for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component. The default value is End Date, which is a field in the TNT SHM Property Day Part Pricing business component.

Time Part BC Minor End Time Field

Use this user property to retrieve the End Time for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component.

Value	End Time
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property retrieves the End Time for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component. The default value is End Time, which is a field in the TNT SHM Property Day Part Pricing business component.

Time Part BC Minor Name Field

Use this user property to retrieve the Name for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component.

Value	Name
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property retrieves the Name for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component. The default value is Name, which is a field in the TNT SHM Property Day Part Pricing business component.

Time Part BC Minor Start Date Field

Use this user property to retrieve the Start Date for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component.

Value	Start Date
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property retrieves the Start Date for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component. The default value is Start Date, which is a field in the TNT SHM Property Day Part Pricing business component.

Time Part BC Minor Start Time Field

Use this user property to retrieve the Start Time for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component.

Value	Start Time
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property retrieves the Start Time for which to retrieve the time part details from the TNT SHM Property Day Part Pricing business component. The default value is Start Time, which is a field in the TNT SHM Property Day Part Pricing business component.

TimeScale:Day/Day-Part

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	1
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TimeScale:Day/Half-Hour

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	1
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TimeScale:Day/Hour

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	1
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TimeScale:Day/Quarter-Hour

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	1
Parent Object Type	TNT SHM SR Inventory Dync business component

Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TimeScale:Month/Day

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	1
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TimeScale:Month/Day-of-Week

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	7
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TimeScale:Month/Day-of-Week/Day Part

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	7
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TimeScale:Week/Day

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	1
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TimeScale:Week/Day/Day Part

This user property is used to specify the number of days to be added to determine the date range columns for the Total Availability view.

Value	1
Parent Object Type	TNT SHM SR Inventory Dync business component
Usage	This user property specifies the number of days to be added to determine the date range columns for the Total Availability view.

TNT SHM Site Function Space Diary Total Availability View:BC 1

If a user navigates to the TNT SHM Site Function Space Diary Total Availability View, then this user property refreshes the TNT SHM SR Inventory Dync business component.

Value	TNT SHM SR Inventory Dync
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	If a user navigates to the TNT SHM Site Function Space Diary Total Availability View, then this user property refreshes the TNT SHM SR Inventory Dync business component.

Total Availability Applet Name

This user property is used to provide the Total Availability applet name.

Value	TNT SHM SR Inventory Display Dync List Applet - Total Availability
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property provides the Total Availability applet name.

Use Working Hours

This user property is used to specify whether or not to use working hours in each time scale.

Value	1;N;2;N;4;Y;8;Y;16;Y;32;N;64;N;128;N;256;N
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval For Order PopUp VBC business component TNT SHM Inventory Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property specifies whether or not to use working hours in each time scale. If working hours are used, the horizontal scroll position is set depending on the start time of the working day and the pixels per unit. If working hours are not used, the horizontal scroll position is set to zero.

X-Axis Drill Down Enable

This user property is used to specify whether or not to set the field value of Drilldown Name.

Value	Y
Parent Object Type	TNT SHM Gantt AX Date Time Interval PopUp VBC business component
Usage	This user property specifies whether or not to set the field value of Drilldown Name.

Business Component User Property for Opportunities

This topic describes the property that supports meeting packages functionality in the Opportunity business component:

- *Template Copy History*

Template Copy History

This user property is used to provide the field name that evaluates to Y or N, depending on which properties and histories are copied when a generic event template is created.

Value	Copy Properties Flag
Parent Object Type	Opportunity business component
Usage	This user property is used to provide the field name that evaluates to Y or N, depending on which properties and histories are copied when a generic event template is created.

Applet User Properties for Quotes

This topic describes the user properties that support meeting packages functionality in the Quotes applets:

- *Quote Item BC Name*
- *Quote Meeting Pkgs BC*

Quote Item BC Name

This user property is used in C++ code to read the nonfunction line items (TNT Quote Item) business component name for time shift functionality.

Value	TNT Quote Item
Parent Object Type	TNT SHM Time Shift Parameter Event Popup Applet
Usage	This user property is used in C++ code to read the nonfunction line items (TNT Quote Item) business component name for time shift functionality.

Quote Meeting Pkgs BC

This user property is used in C++ code to read the quote meeting packages (TNT Quote Meeting Packages) business component name for time shift functionality.

Value	TNT Quote Meeting Packages
Parent Object Type	TNT SHM Time Shift Parameter Event Popup Applet
Usage	This user property is used in C++ code to read the quote meeting packages (TNT Quote Meeting Packages) business component name for time shift functionality.

Business Component User Properties for Quotes

This topic describes the user properties that support meeting packages functionality in the Quotes applets:

- *Exclude Function For Time Shift*
- *Exclude RmBlk For Time Shift*
- *Field Core Flg*
- *Field Name: Shifted Start Date*
- *Field Name: TNT Meeting Package Picklist Search Spec*
- *Quote Revised Item BC*

- *Time Shift: Meeting Pkg BC Name*

Exclude Function For Time Shift

This user property is used in C++ code to read the Quote Meeting Package Id field name to determine whether to exclude functions from a selective time shift.

Value	Quote Meeting Package Id
Parent Object Type	TNT SHM Function Business Component
Usage	This user property is used in C++ code to read the Quote Meeting Package Id field name to determine whether to exclude functions from a selective time shift.

Exclude RmBlk For Time Shift

This user property is used in C++ code to read the Quote Meeting Package Id field name to determine whether to exclude room block items from a selective time shift.

Value	Quote Meeting Package Id
Parent Object Type	TNT SHM Quote Room Block Business Component
Usage	This user property is used in C++ code to read the Quote Meeting Package Id field name to determine whether to exclude room block items from a selective time shift.

Field Core Flg

This user property is used in C++ code to read the Core Flag field name for time shift functionality.

Value	Core Flag
Parent Object Type	TNT Quote Item, TNT SHM Function, TNT SHM Quote Item, TNT SHM Quote Room Block, TNT SHM Quote Room Block Line Items Business Components
Usage	This user property is used in C++ code to read the Core Flag field name for time shift functionality.

Field Name: Shifted Start Date

This user property is used in C++ code to read the Shifted Start Date field name for time shift functionality.

Value	Shifted Start Date
Parent Object Type	TNT Quote Meeting Packages Business Component

Usage	This user property is used in C++ code to read the Shifted Start Date field name for time shift functionality.

Field Name: TNT Meeting Package Picklist Search Spec

This user property is used in C++ Code to get the name of the field that stores the search specification for displaying Meeting Packages in the TNT Quote Meeting Package pick applet.

Value	TNT Meeting Package Picklist Search Spec
Parent Object Type	TNT SHM Quote Room Block business component
Usage	This user property is used in C++ Code to get the name of the field that stores the search specification for displaying Meeting Packages in the TNT Quote Meeting Package pick applet.

Quote Revised Item BC

This user property is used in C++ code to read the revised nonfunction line item (TNT Revised Quote Item) business component name for time shift functionality.

Value	TNT Revised Quote Item
Parent Object Type	Quote Business Component
Usage	This user property is used in C++ code to read the revised nonfunction line item (TNT Revised Quote Item) business component name for time shift functionality.

Time Shift: Meeting Pkg BC Name

This user property is used in C++ code to read the quote meeting packages (TNT Quote Meeting Packages) business component name for time shift functionality.

Value	TNT Quote Meeting Packages
Parent Object Type	TNT Quote Meeting Packages Business Component
Usage	This user property is used in C++ code to read the quote meeting packages (TNT Quote Meeting Packages) business component name for time shift functionality.